

Scotland's Rural College

Scottish Agricultural Tenure Evidence Review - Seasonally let-in grazing land

Thomson, SG

Print publication: 01/01/2021

Document Version

Publisher's PDF, also known as Version of record

[Link to publication](#)

Citation for pulished version (APA):

Thomson, SG. (2021). *Scottish Agricultural Tenure Evidence Review - Seasonally let-in grazing land*. Scotland's Rural College (SRUC).

General rights

Copyright and moral rights for the publications made accessible in the public portal are retained by the authors and/or other copyright owners and it is a condition of accessing publications that users recognise and abide by the legal requirements associated with these rights.

- Users may download and print one copy of any publication from the public portal for the purpose of private study or research.
- You may not further distribute the material or use it for any profit-making activity or commercial gain
- You may freely distribute the URL identifying the publication in the public portal ?

Take down policy

If you believe that this document breaches copyright please contact us providing details, and we will remove access to the work immediately and investigate your claim.

Rural Policy Centre



Scottish Agricultural Tenure Evidence Review - Seasonally let-in grazing land

Author: Steven Thomson

March 2015

Research Report for
The Scottish Government



Leading the way in Agriculture and Rural Research, Education and Consulting

Scottish Agricultural Tenure Evidence Review - Seasonally let-in grazing land

Rural Policy Centre Research Report

Steven Thomson
Senior Agricultural Economist
Rural Policy Analysis Team
SRUC



**The Scottish
Government**
Riaghaltas na h-Alba

***This work was funded by the Scottish Government
as part of its Economic Information Advisory
Activity 211 and underpinned by the Theme 4:
Economic Adaptation of the Scottish Government's
Environmental Change Strategic Research
Programme 2011-2016***

March 2015

1 INTRODUCTION

- 1.1 The context for this report is that the Agricultural Holdings Legislation Review Group wanted further evidence on seasonal grazing lets to inform their assessment of the importance of grazing lets as a crucial entry point to farming.
- 1.2 This report therefore extends the analysis of seasonally let land conducted as part of the *Scottish Agricultural Tenure Evidence Review* by examining seasonally let land trends from 2005 to 2013 and assessing the characteristics of farms renting in seasonal grazing lets in 2013.
- 1.3 This work was funded by the Scottish Government as part of its Economic Information Advisory Activity 211.

2 EXECUTIVE SUMMARY

- 2.1 The use of seasonal grazing lets is an integral part of Scotland's livestock sector with 49% of holdings with cattle and 30% of holdings with sheep renting-in seasonal grassland or rough grazing in 2013. These holdings accounted for 68.6% of the national cattle herd and 54.4% of the national sheep flock.
- 2.2 Around 44% of Single Farm Payment (SFP) claimants' rented-in seasonal land in 2013. There was a 15% increase in the number of businesses renting-in seasonal land that was used in SFP claims between 2005 and 2013. Over this period there was a 15% decline in the number of businesses renting-in permanent pasture, temporary grass and land for cropping. However the number of businesses renting-in seasonal rough grazing more than doubled, to 5,152 holdings in 2013, and about a quarter of all SFP claimants rented-in seasonal rough grazing in 2013.
- 2.3 There was a 41% increase in the area of seasonally let land between 2005 and 2013. Over this period the amount of temporary grass seasonally let-in was very stable whilst the amount of permanent grass lets fell by 18,000ha (13%). Cropping lets fluctuated within a 5,000ha band with the 2013 amount just under the 2005 level. There was, however, a 74% increase in the amount of seasonally let-in rough grazing over the period that coincided with the introduction of the SFP and the concept of 'naked acres' and 'slipper farming'.
- 2.4 Whilst the number of businesses and area of seasonal grazing lets increased between 2005 and 2013 there was relative stability in the amounts being let-in (i.e. more may be renting, but of similar amounts). The exception was for rough grazing land where the size profile changed over time. Whilst the median was relatively stable (it fell by 3ha) the mean area decreased (by 20ha) and the inter-quartile range decreased (by 15ha) suggesting that extra businesses renting-in rough grazing were generally renting-in relatively small amounts. This was consistent with anecdotal observations that some farmers wanted additional security with regards their eligible hectares required to activate SFP entitlements after 2009 so they rented (relatively cheaply) a small amount of 'naked acres'.
- 2.5 Holdings in the crofting regions had a lower propensity to rent-in seasonal grazings in 2013. In contrast the highest incidence of seasonal grazing rentals occurred in the dairy regions of Dumfries and Galloway (27% of holdings) and Ayrshire (24% of holdings). A third of Scottish cattle and sheep holdings (both Less Favoured Areas (LFA) and non-LFA) rented-in seasonal grazings as did a

significant 64% of dairy holdings. About half of the Scottish medium (48%), large (54%) and very large (50%) holdings rented-in seasonal grazings with only 8% of very small holdings doing so.

- 2.6 In 2013 there were differences in frequency of seasonal grazing renting between holding size and type of grazings:
- Very small holdings made up 40% of the holdings that rented-in seasonal permanent grass but only accounted for 24% of the area.
 - Large and very large holdings collectively accounted for 29% of the holdings with seasonal permanent grass lets and 46% of the area rented-in.
 - 36% of holdings that rented-in seasonal temporary grass were large or very large and they utilised 54% of the total area.
 - Very small holdings accounted for 35% of the holdings that rented-in seasonal rough grazing but only accounted for 22% of the area.
 - Very large holdings only accounted for 13% of seasonal rough grazing lets but 26% of the area.
- 2.7 Average areas of seasonal grazings were heavily skewed by some very large areas being rented. In the very large group the average area of seasonal rough grazing let in was 211ha compared to a median of 50ha. However, within this size grouping there were 14 holdings that rented-in more than 3,000ha of rough grazing on a seasonal basis and collectively they accounted for 20% of Scottish seasonal rough grazing lets in 2013.
- 2.8 LFA cattle and sheep holdings were important users of seasonal grazings, and in 2013 they accounted for:
- 64% of the holdings renting-in seasonal permanent grass and 69% of the area.
 - 48% of the holdings and 51% of the area leased of temporary grass.
 - 52% of the holdings and 61% of the area of seasonal rough grazing lets.
- 2.9 For LFA cattle and sheep the 78 holdings renting-in more than 1,000ha seasonal rough grazing (totalling over 150,000ha) had a significant impact on the average area rented (123ha). With the median as low as 21ha it suggested that the majority of rentals were small in nature. These 78 holdings did, however, collectively carry 78,000 sheep and 6,600 cattle.
- 2.10 The average area of seasonal rough grazing rented-in by cereal and cropping farms was notably high at (122ha and 90ha respectively) in 2013. As there was only a relatively small proportion of these farm types renting-in seasonal grazings these averages were heavily influenced by the 10 holdings that rented-in over 1,000ha each (with a combined area of seasonal rough grazing lets of 19,000ha). There were only 273 cattle and zero sheep recorded on these holdings.
- 2.11 Holdings in the North East of Scotland were the main renters of seasonal rough grazings and temporary grass. In 2013 the region accounted for 19% of the all holdings and 20% of total seasonal rough grazing area let-in and 36% of holdings and 40% of the total area of temporary grass let in. Dumfries and Galloway and Ayrshire were the main regions for renting seasonal permanent grass and collectively they accounted for 21% of Scottish holdings and 30% of total permanent grass seasonally let-in during 2013.
- 2.12 On medium to very large holdings the seasonal grazers had smaller areas of both tenanted and owned land compared to non-seasonal grazers (although

using the median the differences were largely closed). These figures were, however, skewed by larger units in the non-seasonal grazers group. Within these size groupings:

- 55% of holdings that had tenanted land were seasonal grazers and they controlled 45% of the tenanted area.
- Seasonal grazers accounted for around half of all holdings that owned land but only accounted for 25-30% of the total owned area.

2.13 Seasonal grazing was found to be common for holdings that carried cattle or sheep in 2013:

- Seasonal grazers accounted for just half of all holdings that had cattle yet they carried nearly 70% of the national herd.
- Both mean and median cattle herd sizes were consistently larger amongst the seasonal grazers than the non-seasonal grazers in 2013.
- Seasonal grazers only accounted for 30% of total holdings with sheep although they carried 55% of the national flock. In the larger size groupings more than half the holdings with sheep were seasonal grazers in 2013.
- The sheep flock sizes were relatively similar across size groups although at a national level the seasonal grazing renters had larger flocks on average.

2.14 There was a much higher propensity for dairy holdings with tenanted land (60%) or owned land (66%) to use seasonal lets. A smaller proportion of cattle and sheep holdings in the LFA that rented land (32%) or owned land (37%) took on seasonal lets. Mixed holdings that took on seasonal grazings tended to be bigger than non-seasonal grazing mixed holdings. This accounted for 13% of the holdings that owned land but controlled 38% of the owned area and a quarter of holdings with land under tenure but controlled 54% of the tenanted area.

2.15 In 2013 across all robust farm types the average (measured by mean or median) number of sheep and cattle held was larger for holdings that used seasonal grazing lets.

- 63% of dairy holdings were seasonal grazers. They carried 68% of all cattle held on dairy holdings with an average herd size of 443 cattle (median 364) compared to 351 (299 median) for non-seasonal grazing renters.
- Just over half the LFA cattle and sheep holdings that carried cattle were seasonal grazers in 2013. These holdings accounted for 72% of the total cattle held by LFA cattle and sheep holdings. These holdings had an average herd size of 180 cattle (median 118) compared to only 72 (median 24) for the non-season grazing renters.
- A third of all holdings with sheep in the LFA cattle and sheep group used seasonal grazings in 2013 and they accounted for 54% of all sheep held by the group. Seasonal grazers had an average flock size of 838 sheep (median 437) compared to only 337 (median 78) for the non-seasonal grazing renters.

2.16 There were considerable regional differences in the proportion of holdings with tenanted land that was controlled by seasonal grazers:

- In Ayrshire 45% of the holdings with tenanted land were seasonal grazers in 2013 and they accounted for 45% of the total tenanted area.
- In Dumfries and Galloway seasonal grazers accounted for 43% of the holdings with tenanted land and 53% of the tenanted area.

- 2.17 The proportion of the amount of land owned (ha) by the seasonal grazers was disproportionately large to the proportion of holdings with owned land that were seasonal grazers in 2013.
- In Ayrshire the seasonal grazers only accounted for 21% of the holdings that owned land but had 41% of the owned area.
 - In Orkney the seasonal grazers only accounted for 21% of the holdings with owned land but 49% of the owned area.
- 2.18 Seasonal grazers in all regions accounted for a disproportionately large proportion of the number of cattle and sheep held:
- In Dumfries and Galloway the seasonal renters accounted for 54% of all holdings with cattle and 69% of the cattle within the region.
 - In the North East of Scotland just under a half of holdings with cattle rented-in seasonal grazings yet they accounted for 69% of the regions cattle.
 - In Highland the seasonal grazing renters accounted for a quarter of all holdings with sheep but 46% of all sheep within the region.
 - In the Borders the seasonal grazing renters accounted for 35% of the holdings with sheep but 53% of the sheep within the region.

CONTENTS

1	Introduction	i
2	Executive Summary	i
3	Methodology.....	1
	Data Sources.....	1
	Data Analysis.....	1
	Data Integrity	3
	Data Summaries	3
4	Seasonally let-in land – an overview.....	4
	Type of Occupier	7
5	Seasonal Grazing Lets – where and who?	9
	Holding Size	10
	Robust Farm Types	11
	Agricultural Region	13
6	Characteristics of Holdings Renting-in Seasonal Grazings	16
	Holding Size	16
	Robust Farm Type	20
	Agricultural Region	24
	Appendix 1	28
	Data Summary: Size Category.....	28
	Data Summary: Robust Farm Type.....	29
	Data Summary: Agricultural Region	30

LIST OF TABLES

Table 1 Size grouping of holdings	2
Table 2 Number of holdings renting-in seasonal land for SFP by use, 2005–2013	4
Table 3 Area of seasonally let-in SFP land recorded in IACS by use, 2005 – 2013	5
Table 4 Regional distribution of rented-in seasonal grazing land and holdings, 2013	14
Table 5 Mean and median area of rented-in seasonal grazing land and holdings by agricultural region, 2013	15
Table 6 Regional distribution of holdings with tenanted land, owned land, cattle and sheep that used seasonal grazings in 2013	25
Table 7 Land and stocking data for seasonal grazers and non-seasonal grazer holdings by size category, 2013	28
Table 8 Land and stocking data for seasonal grazers and non-seasonal grazer holdings by robust farm type, 2013.....	29
Table 9 Land and stocking data for seasonal grazers and non-seasonal grazer holdings by robust agricultural region, 2013	30

LIST OF FIGURES

Figure 1 JAC Agricultural Regions.....	2
Figure 2 Boxplot of the total seasonally let-in area per holding in Scotland: 2005 and 2009-2013	6
Figure 3 Boxplot of the areas of seasonally let-in area per holding by land use in Scotland: 2005 and 2009-2013	7
Figure 4 Proportion of holdings and area of seasonally rented land by occupier status, 2013	8
Figure 5 Proportion of holdings within size category, robust farm type and agricultural region that were seasonal grazers in 2013.....	9
Figure 6 Proportion of Scottish rented-in seasonal grazing land and seasonal grazers by holding size, 2013.	10
Figure 7 Mean and median area of rented-in seasonal grazing land and holdings by holding size, 2013.....	11
Figure 8 Proportion of total rented-in seasonal grazing land and holdings by robust farm type, 2013.	12
Figure 9 Mean and median area of rented-in seasonal grazing land and holdings by robust farm type, 2013	13
Figure 10 Proportion of Scottish seasonally let TGRS, PGRS and RGR by parish, 2013	13
Figure 11 Proportion of tenanted and owned holdings and area held by seasonal grazers across size groups, 2013.....	16
Figure 12 Mean and median area of tenanted land by size group and whether seasonal grazings were rented-in, 2013	17
Figure 13 Mean and median area of owned land by size group and whether seasonal grazings were rented-in, 2013	17
Figure 14 Proportion of cattle and sheep holdings and number of animals held by holding size groups for those that rented-in seasonal grazings, 2013	18

Figure 15 Mean and median number of cattle by size group and whether seasonal grazings were rented-in, 2013	19
Figure 16 Mean and median number of sheep by size group and whether seasonal grazings were rented-in, 2013	19
Figure 17 Proportion holdings with owned or tenanted land that rented-in seasonal grazing in 2013, by robust farm type.....	20
Figure 18 Mean and median area of tenanted land by robust farm type and whether seasonal grazings were rented-in, 2013	21
Figure 19 Mean and median area owned by robust farm type and whether seasonal grazings was rented-in, 2013.....	21
Figure 20 Proportion of cattle and sheep holdings and number of animals held by robust farm type for holdings that rented-in seasonal grazings, 2013.....	22
Figure 21 Mean and median number of cattle by robust farm type and whether seasonal grazings were rented-in, 2013	23
Figure 22 Mean and median number of sheep by robust farm type and whether seasonal grazings were rented-in, 2013	23
Figure 23 Mean and median area of tenanted land by agricultural region and whether seasonal grazings were rented-in, 2013.....	25
Figure 24 Mean and median area of owned land by agricultural region and whether seasonal grazings were rented-in, 2013	26
Figure 25 Mean and median number of cattle by agricultural region and whether seasonal grazings were rented-in 2013	27
Figure 26 Mean and median number of sheep by agricultural region and whether seasonal grazings were rented-in, 2013	27

3 METHODOLOGY

- 3.1 This analysis builds on the analysis of seasonally let land conducted as part of the Scottish Agricultural Tenure Evidence Review¹ for the Agricultural Holdings Legislation Review Group. The analysis for this report focuses on seasonal grazing lets and examines the types of businesses renting-in seasonal grazing land.

Data Sources

- 3.2 This report draws on data provided by the Scottish Government's Rural and Environment Science and Analytical Services (RESAS) for the years 2005 to 2013. Holding level June Agricultural Census (JAC)² variables were used in conjunction with data on seasonally let land (less than a year), that was collected from the Single Application Form (SAF) as part of the Integrated Administration and Control System (IACS). The SAF data provided field level information on the use of seasonally let land (both in and out) for each holding and business. Only seasonally let-in grazing land was scrutinised for this analysis as it was considered more accurate than seasonally-let out land due to the level of scrutiny it receives as it is used to activate Single Farm Payment (SFP) entitlements.
- 3.3 For the analysis of land let under agricultural holdings legislation (leases of more than a year) conducted for the Scottish Agricultural Tenure Evidence Review croft holdings were excluded as crofting leases fall out-with the scope of agricultural holdings legislation. However, as seasonal lets fall out-with the controls of crofting legislation, croft holdings were included in the analysis conducted in this report.

Data Analysis

- 3.4 The analysis examined seasonally let land across five different size classifications that are based on Scottish Government criteria detailed in Table 1. The standard labour requirements for different cropping and stocking activities for each holding were used to estimate the total labour requirement of each holding. This labour requirement was then used to determine the size category of each holding. Very small holdings required less than 1,900 hours of standardised labour input per annum whilst the very large holdings required more than 9,500 hours of standardised labour input.
- 3.5 Using Microsoft Access the SAF and JAC datasets were merged for each year using the unique County Parish Holding (CPH) number. Minitab and Microsoft Excel were used to analyse the data. Where possible the seasonal grazing let-in data was analysed by: JAC agricultural region (see Figure 1); robust farm type, and; size category.

¹ Thomson, *et al* (2014) Scottish Agricultural Tenure Evidence Review
<http://www.gov.scot/Publications/2014/06/9792/0>

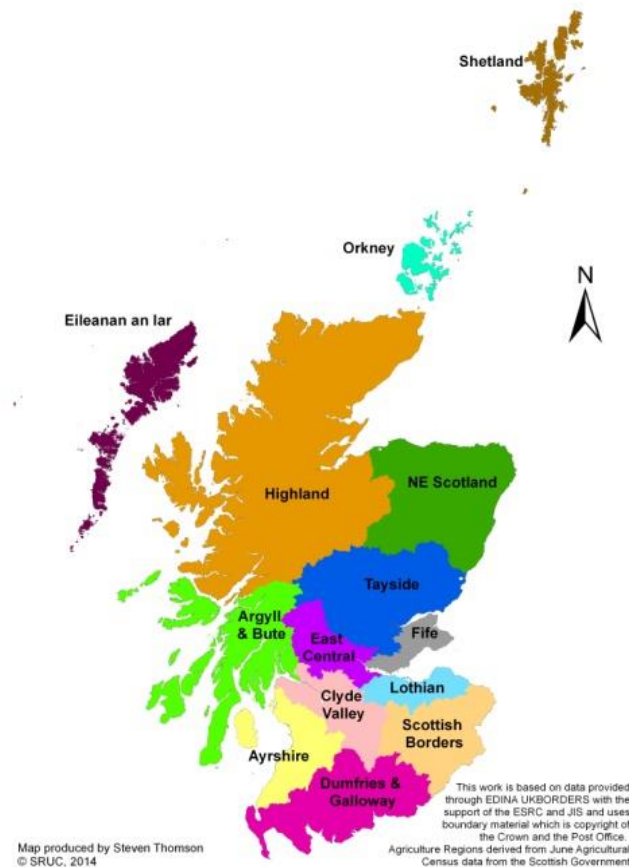
² Scottish Government Results of the June Scottish Agricultural Census 1999-2014
<http://www.gov.scot/Topics/Statistics/Browse/Agriculture-Fisheries/PubFinalResultsJuneCensus>

Table 1 Size grouping of holdings

Size Category	Standard Labour Requirement - Hours	Standard Labour Requirements
Very small	<1,900 hours	<1 FTE
Small	1,900-3,800 hours	1-2 FTEs
Medium	3,800 – 5,700 hours	2-3 FTEs
Large	5,700 – 9,500 hours	3-5 FTEs
Very large	> 9,500 hours	>5 FTEs

Adapted from Scottish Government 2014³

Figure 1 JAC Agricultural Regions



- 3.6 The analysis focused specifically on seasonal grazing let-in land, and therefore provides an overview of seasonally let Permanent Grassland (PGRS), Temporary Grassland (TGRS) and Rough Grazing (RGR). The JAC data was used to provide a generalisation of the types of holdings, leasing-in seasonal grazings.
- 3.7 Spearman rank correlation coefficients⁴ were used to determine strength and direction of relationships between seasonally let-in grazing land and other JAC variables. Whilst many statistically significant relationships were identified the coefficients were very close to zero meaning no discernible relationship between the variables could be found.

³ Scottish Government (2014) Economic Report on Scottish Agriculture, 2014. Table C26.

<http://www.gov.scot/Publications/2014/06/3709/67>

⁴ Weinberg, S. and Abramowitz, S. (2002) Data Analysis for the Behavioural Sciences Using SPSS. Cambridge University Press.

Data Integrity

- 3.8 In some cases there were quite large discrepancies between the seasonally let data supplied through JAC and SAF, particularly for seasonally let-out land. Whilst the SAF data was considered to be more robust as it relates to CAP support applications that may give rise to financial penalties for erroneous claims, issues were also identified within that dataset. The data was split into seasonally let-in land that was used to claim SFP, and “other” seasonally let-in land. RESAS, considered that as the “other” category did not receive the same degree of scrutiny as the SFP let-in data a number of significant anomalies may have been present in the data (e.g. where the entire area of estates seasonally let-out land were included in the figures) that *“will have a substantial impact on any analysis due to their large areas, unless they are excluded.”*⁵
- 3.9 For the reasons outlined above, the main part of this analysis only scrutinises the data on seasonally let-in grazing land from the SAF used to claim SFP. This meant other seasonally let land was excluded. This, therefore, means there is an under representation of the amount of seasonally let-in land throughout this analysis.
- 3.10 When merging the SAF and JAC datasets there was a presumption that the JAC dataset was a complete list of holdings across Scotland. However there were a number of holdings identified in the SAF dataset that did not appear in the JAC dataset. This meant that agricultural details (e.g. of type, cropping and stocking, etc.) were missing for some holdings letting-in season grazings. For example in 2013 there were 637 holdings identified in the SAF that could not be matched to JAC holdings which meant that they had to be excluded from the analysis where JAC variables were assessed. For the introductory section on total seasonal lets the full SAF dataset is reported.

Data Summaries

- 3.11 Tables summarising the key data used in the report is provided by agricultural region, robust farm type and size grouping for 2013 in Appendix 1.

⁵ Pers. Comm. RESAS, October 2014.

4 SEASONALLY LET-IN LAND – AN OVERVIEW

- 4.1 This section draws on the data on rented-in land submitted annually by farmers in their SAF used to activate SFP entitlements. The amount of Scottish seasonally let-in land increased from 510,805ha in 2005 to 721,907ha in 2013, representing a 41.3% increase. In 2013 this equated to 12.9% of total agricultural land (5,604,008ha) in Scotland. This increase was entirely accounted for by the growth in the amount of rough grazing seasonally let-in land with other forms of seasonally let land declining over the period.
- 4.2 Table 2 shows that there was a 15% increase in the number of businesses / holdings⁶ renting-in seasonal land for SFP claims between 2005 and 2013. This meant that in 2013 there were 9,036 businesses renting-in seasonal land as part of their SFP claim, equating to about 44% of total SFP claimants.
- Between 2005 and 2009 the number of businesses renting-in seasonal cropping land and temporary grassland (TGRS) fell by about 15% and subsequently stabilised with 1,989 businesses renting in TGRS in 2013.
 - There was a 15% decrease in the number of businesses letting-in permanent pasture (PGRS) seasonally between 2005 and 2013. This appears to a long-term gradual decline with 4,604 businesses renting in PGRS in 2013.
 - In contrast, between 2005 and 2013 the number of businesses letting-in rough grazing (RGR) on a seasonal basis more than doubled (to 5,152) with around a quarter of all SFP claimants having rented-in RGR in 2013. Whilst some of this increase was undoubtedly accounted for by "slipper farmers" using "naked acres"⁷ more than half of this increase occurred post 2009. In 2009 the approach to the enforcement of land eligibility changed as a result of European audit scrutiny and national disallowance⁸ that led many active farmers to renting RGR on a seasonal basis as insurance to make sure they had enough eligible land to activate SFP entitlements (ie. to cover the possibility that some of their land was declared ineligible meaning they would have tried to activate more entitlements than the amount of eligible land they had that resulting in a penalty).

Table 2 Number of holdings renting-in seasonal land for SFP by use, 2005–2013

Year	Field Use (holdings)				Total (businesses)
	Temporary Grassland	Permanent Grassland	Rough Grazing	Crops	
2005	2,216	5,438	2,514	1,527	7,852
2009	1,998	5,001	3,583	1,307	8,176
2010	1,986	4,921	3,979	1,292	8,444
2011	1,981	4,873	4,532	1,337	8,790
2012	2,079	4,744	4,816	1,341	8,948
2013	1,989	4,604	5,152	1,318	9,036
%change 2005-13	-10.2%	-15.3%	104.9%	-13.7%	15.1%

⁶ The number of holdings and businesses (represented by unique Business Reference Numbers) were the same.

⁷ 'Slipper farmers' (did not need any farming connection) that purchased SFP entitlements which were then activated by renting-in land (generally cheap, unproductive hill) that was not used to claim SFP ("naked acres"). This land did not require any agricultural activity to meet cross compliance requirements meaning the individual received CAP support despite being agriculturally inactive.

⁸ See Pack, B. (2013) Doing Better Initiative to Reduce Red Tape in Agriculture - Interim Report.

<http://www.scotland.gov.uk/Publications/2013/12/4967/0>

- 4.3 Table 3 shows that the area of seasonally let-in TGRS remained relatively stable throughout the period fluctuating between 36,000ha and 39,000ha. There was a 13.5% decline in the amount of PGRS let-in seasonally, falling from about 137,000ha in 2005 to about 119,000ha in 2013. The amount of seasonally let-in land used for crops fell marginally over the period, fluctuating between 20,500ha and 25,500ha. There was a considerable increase in seasonally-let RGR land over the 2005 to 2013 period (a 73.8% increase) from 312,986ha in 2005. As described above, this increase coincided with the introduction of the SFP and the phenomenon of 'slipper farming' plus the growth (particularly post 2009) in the practice of renting-in of 'naked acres' by active farmers looking to ensure they had adequate eligible land to activate all entitlements.

Table 3 Area of seasonally let-in SFP land recorded in IACS by use, 2005 – 2013

Year	Field Use (Ha)				Total (Ha)
	Temporary Grassland	Permanent Grassland	Rough Grazing	Crops	
2005	38,521	137,680	312,986	21,618	510,805
2009	37,098	143,729	429,678	25,692	636,198
2010	35,903	144,328	447,767	25,057	653,056
2011	36,050	131,118	490,504	22,418	680,091
2012	39,275	121,766	522,776	21,738	705,555
2013	38,049	119,162	544,106	20,590	721,907
% change 2005 to 2013	-1.2%	-13.5%	73.8%	-4.8%	41.3%

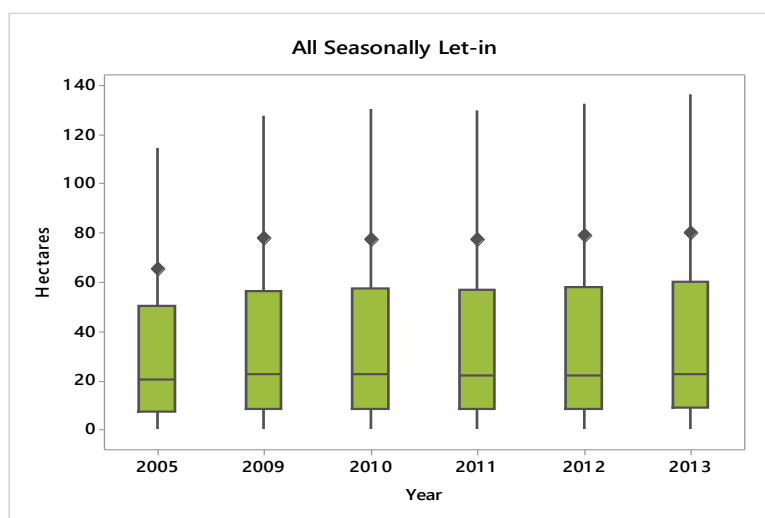
- 4.4 Figure 2 shows the Tukey boxplots⁹ for all seasonally let-in land in 2005 and between 2009 and 2013. The boxes illustrate the inter-quartile ranges. Three-quarters of all seasonal rentals were smaller than the area represented at the top of each box, whilst a quarter of all seasonally rented areas were lower than the value represented by the bottom of the box. The upper and lower bounds of the range of seasonal lets (excluding outliers) for each year are shown by the whiskers¹⁰. The median area rented-in on a seasonal basis is depicted by the line cutting the box whilst the average (mean) area let-in is shown by the diamond marker. It should be noted that a number of very large outliers interfered with the y-axis scale meaning all outliers were excluded from the figure.

⁹ For a description of Tukey boxplots see Hadley Wickham's 40years of box plots

<http://vita.had.co.nz/papers/boxplots.html>

¹⁰ The bottom of the box is at the 25th percentile (Q1), and the top is at the 75th percentile (Q3) value. The whiskers are the lines that extend from the top and bottom of the box showing the spread of the data. The values at the end of the whiskers (upper and lower adjacent values) are calculated as 1.5 * the interquartile range. Outliers have been excluded due to scale interference.

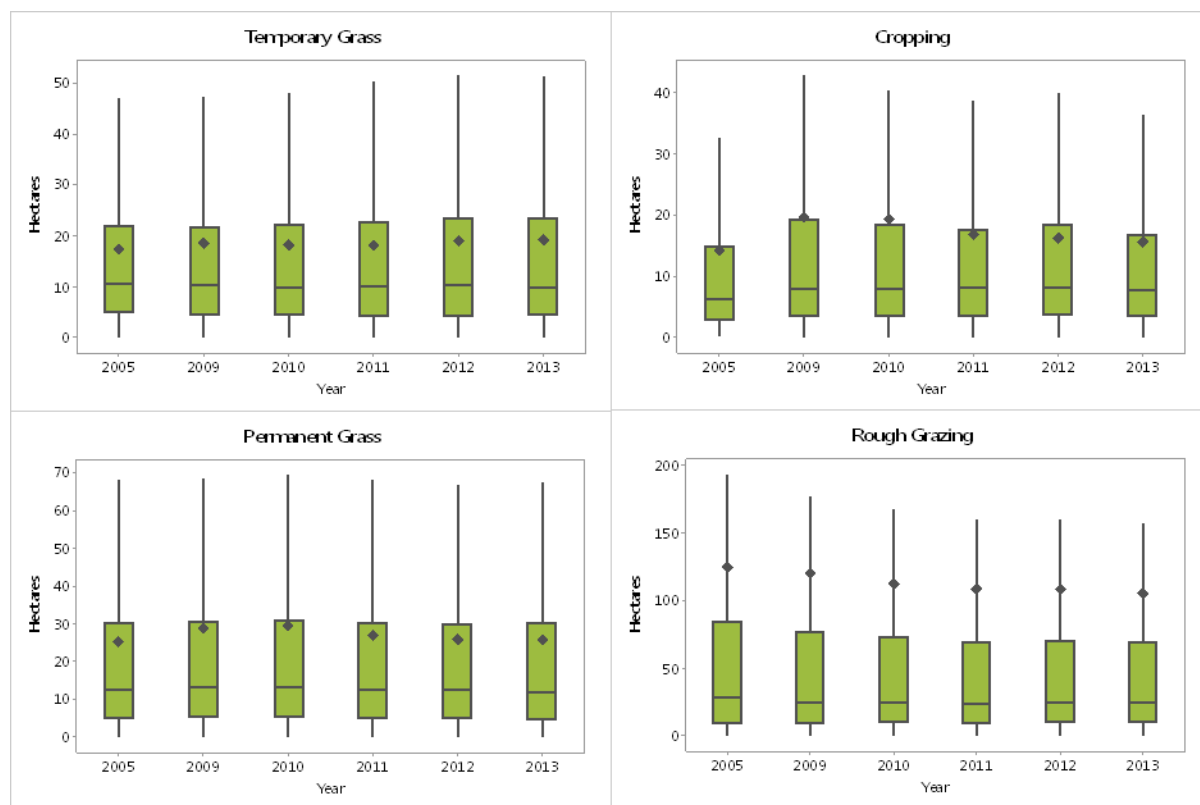
Figure 2 Boxplot of the total seasonally let-in area per holding in Scotland: 2005 and 2009-2013



- 4.5 Figure 2 highlights that the area of land let-in was skewed towards to the lower end (i.e. in each case the median line is below the centre point of the box) over the period. This means that a large proportion of holdings that had seasonal lets only took on small areas. The fact that the average area of land let-in was considerably higher than the median in all cases was caused by the influence of some very large seasonal lets (outliers) on the arithmetic average. Whilst the median area rented-in remained relatively stable at around 20ha over the period the average area increased from 65ha in 2005 to 78ha in 2009, after which it remained stable. The upper bound of the area rented-in also increased from 114ha in 2005 to 136ha in 2013, suggesting a few more holdings were leasing-in larger areas seasonally.
- 4.6 Figure 3 provides an overview of the distribution of seasonally let-in land (excluding outliers) by land use for 2005 and between 2009 and 2013. The areas let-in for all land uses were skewed towards to the lower end (i.e. in each case the median line was below the centre point of the box). This implies that there were a large number of small areas of seasonally let-in land for each of the land use categories. The average area of land let-in was notably higher than the median in all cases (particularly in the case of rough grazing) and this was caused by some very large areas being let-in (outliers).
- 4.7 There was relative stability in the area distribution of TGRS lets since 2005. Over the period there was consistently a quarter of holdings that rented-in less than 5ha of seasonal TGRS, with half renting-in under 10ha and 75% renting-in less than 23ha. There was a small increase in the upper bound of area let-in (excluding outliers) of 5ha over the period.
- 4.8 For cropping lets there was marginally more variation in the average, third quartile and effective range (excluding outliers) over the period and this was perhaps a reflection of changes in local demand caused by reaction to market prices for main crop outputs¹¹. Over the period about quarter of holdings that rented-in seasonal cropping land rented-in less than 3.5ha, with half renting-in less than about 8ha and 75% renting fewer than 19ha.

¹¹ See Chart 4.5 of Scottish Government (2014) Economic Report on Scottish Agriculture 2014 Edition for annual average output prices for cereals 2003 to 2013

Figure 3 Boxplot of the areas of seasonally let-in area per holding by land use in Scotland: 2005 and 2009-2013



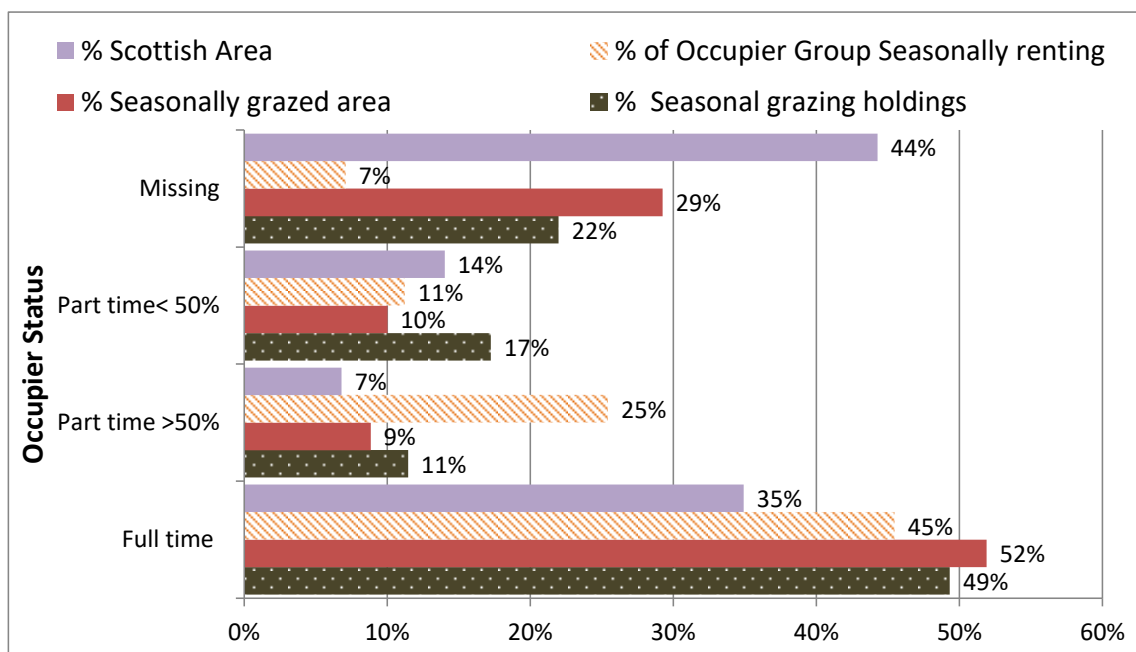
- 4.9 As with temporary grass there was a great deal of stability in the area distribution of PGRS grazing lets. Over the entire period a quarter of holdings renting-in PGRS let-in areas of less than 5ha, with half of them renting-in less than 13ha and three-quarters renting-in less than 30ha.
- 4.10 For RGR seasonal lets there was considerably more change in the area distribution of the lets. Whilst the median only fell from 28ha in 2005 to 24ha in 2013 the average fell from 124ha to 105ha over that period. Consistently a quarter of those renting-in RGR seasonally, rented-in less than 9ha but the upper quartile and upper bound of the RGR data fell over the period by 36ha and 15ha respectively, suggesting there was a change in the profile of rented-in RGR areas. This may well be linked to more people renting-in small additional areas to provide a safety net to ensure they had enough eligible hectares to cover SFP entitlements.

Type of Occupier

- 4.11 Using JAC information on full-time and part-time occupiers Figure 4 reveals that occupier data was missing for 22% of all seasonal grazing holdings (and 29% of the seasonal grazed area). These holdings accounted for only 7% of the 27,000 holdings with missing occupier data (that controlled half of Scottish farmland in 2013). Where occupier status is known it is shown that:
- 45% of full time occupiers rented in seasonal grazings and had a higher propensity to rent-in seasonal grazings than part-time occupiers. They made up 49% of all the holdings that rented seasonal grazings and 52% of the area rented-in 2013.

- Part time occupiers engaged in agriculture for less than half of their time were responsible for 7% of Scottish farmland. Of this group 11% rented-in seasonal grazings in 2013 and they were responsible for 17% of the total seasonally grazed holdings but only 9% of the area.
- 14% of Scottish farmland was under control of part time occupiers engaged in agriculture for more than half of their time in 2013. A quarter of this group rented-in seasonal grazings in 2013 and accounted for 11% of Scottish holdings that rented-in seasonal grazings but only 8% of the rented-in area.

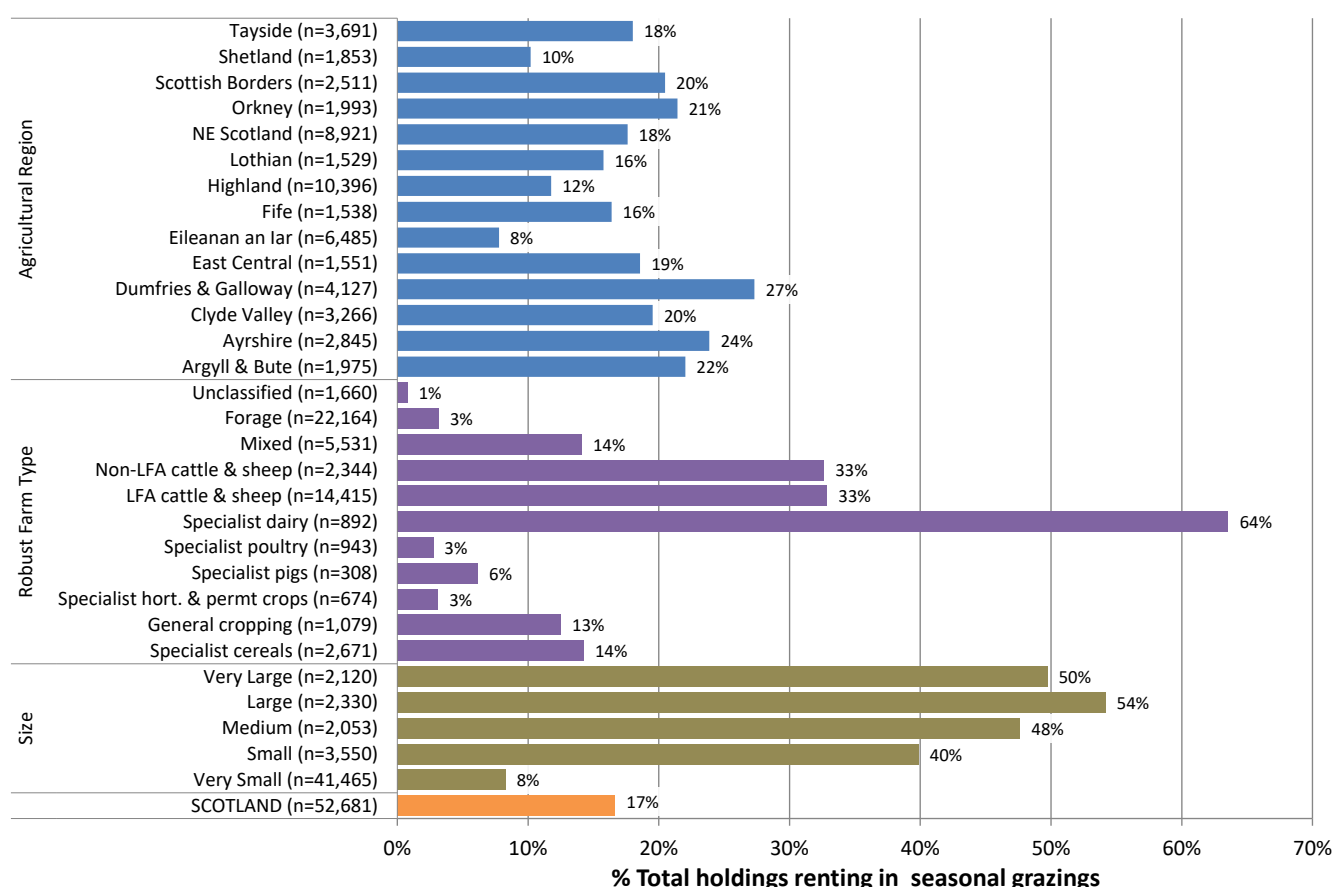
Figure 4 Proportion of holdings and area of seasonally rented land by occupier status, 2013



5 SEASONAL GRAZING LETS – WHERE AND WHO?

5.1 The data used throughout this chapter is summarised in tabular form in Appendix 1. The use and importance of seasonal let-in grazing land (TGRS, PGRS and RGR) differs between farm types, geographies and business size. This section uses the merged holding level data from the SAF and the JAC to give an overview of the types of holdings that rented seasonal grazing lets (seasonal grazers) in 2013¹². Overall 17% of Scotland's 52,681 were seasonal grazers in 2013 as shown in Figure 5.

Figure 5 Proportion of holdings within size category, robust farm type and agricultural region that were seasonal grazers in 2013



5.2 Figure 5 highlights that holdings in the agricultural regions where crofting plays an important role (Eileanan an Iar, Shetland and to a lesser extent Highland) had a lower propensity to rent-in seasonal grazing land in 2013. In contrast 27% of all holdings in Dumfries and Galloway were seasonal grazers in 2013 with 24% in Ayrshire, 22% in Argyll and Bute and about 20% in each of Clyde Valley, East Central, Orkney, Scottish Borders and North East Scotland. It is apparent from Figure 5 that a proportion of all farm types rented-in some seasonal grazings in 2013 but there was considerable difference between farm types. Dairy farms were the most likely to be seasonal grazers (64%) followed by cattle and sheep farms (33%). The very small holdings (based on standard labour requirements) were least likely to rent-in seasonal grazing land (only 8%)

¹² 2013 was used as this was the first year of introduction of new EU methodologies for assessing robust farm types based on standard outputs. This means that the analysis by farm types is non-comparable with earlier years where standard gross margins were used to allocate farm type.

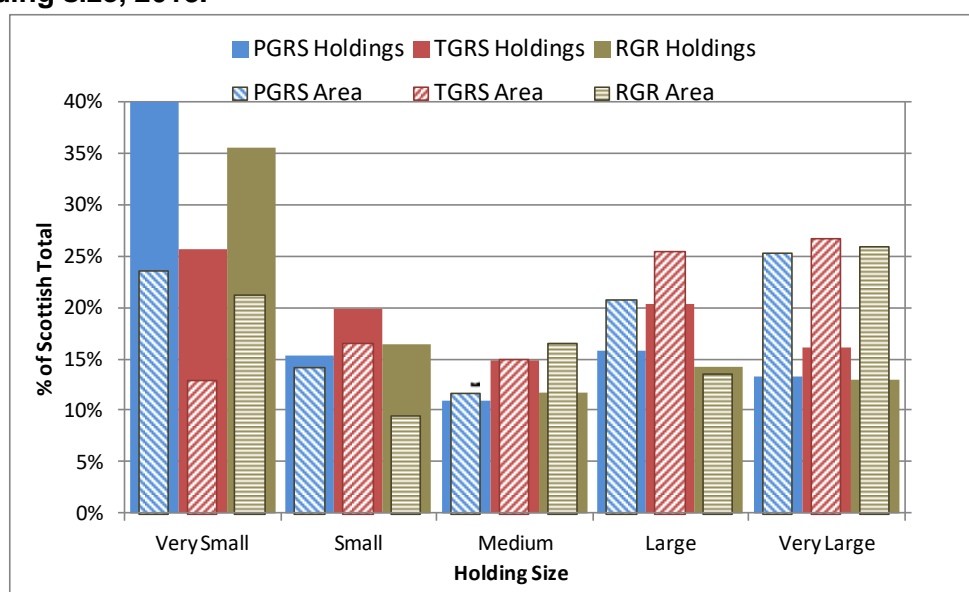
but 48% of medium, 54% of large and 50% of very large holdings rented-in seasonal grazings.

Holding Size

5.3 Figure 6 shows both the proportion of total holdings that were seasonal grazers and the proportion of total area of seasonally grazings (hashed fill bars) within each of the five size categories. In 2013:

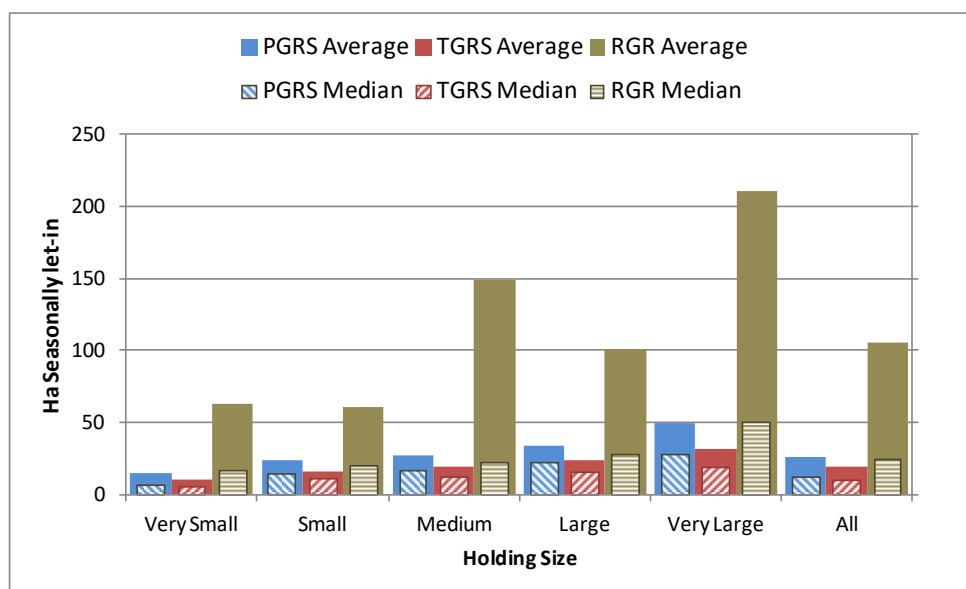
- 4,604 seasonal grazers rented-in 119,162ha of PGRS.
- 40% of all holdings that rented-in PGRS were very small but they only accounted for 24% of the area of PGRS rented-in.
- Large and very large holdings accounted for 16% and 13% of the seasonal grazers renting-in PGRS respectively, yet accounted for 21% and 25% of the total area rented-in.
- 1,989 seasonal grazers rented-in 38,049ha of TGRS.
- 5,152 seasonal grazers let-in 544,106ha of RGR.
- For both TGRS and RGR the very small holdings accounted for a disproportionately large proportion of holdings renting-in seasonal grazings whilst the larger holdings accounted for a disproportionately large area of land let-in.

Figure 6 Proportion of Scottish rented-in seasonal grazing land and seasonal grazers by holding size, 2013.



5.4 Figure 7 shows both the mean (average) and median areas of seasonal grazing land let-in by size group in 2013. It was particularly noticeable that average areas were consistently higher than median areas for each size band and type of grazing let and the differences are influenced by the average being affected by the presence of some very large rentals. For example, 14 holdings (8 of which were in the Highlands) rented-in seasonal RGR areas over 3,000ha that accounted for some 106,000ha. The difference between median and averages was particularly noticeable for RGR where the median area of RGR rented-in on very large holdings was 50ha compared to an average of 211ha. The medium sized holdings also had a very large mean RGR seasonal let-in area (149ha) compared with median (22ha) showing the influence of some very large rental areas.

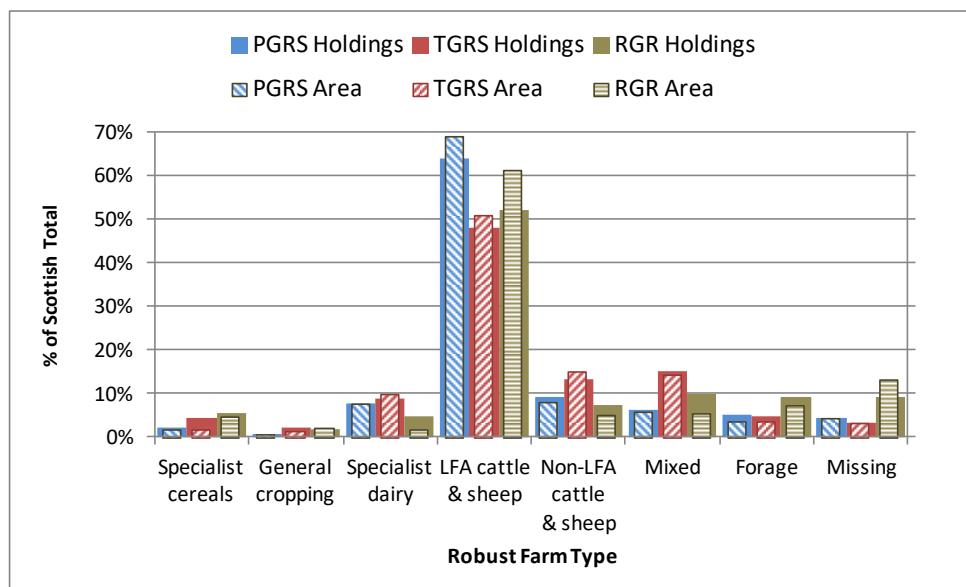
Figure 7 Mean and median area of rented-in seasonal grazing land and holdings by holding size, 2013.



Robust Farm Types

- 5.5 Figure 8 shows both the proportion of total holdings that rented-in seasonal grazings and the total area let-in by the main robust farm types in 2013.
- Despite only accounting for 27% of Scottish holdings and 56% of all farmland in 2013 the LFA cattle and sheep holdings accounted for:
 - 64% of holdings that rented seasonal PGRS (that covered 81,652ha or 69% of the area);
 - 48% of holdings that rented-in TGRS (19,300ha or 51% of the area) and;
 - 52% of the holdings that rented-in of seasonal RGR (328,202ha or 61% of the area) in 2013.
 - Dairy holdings only accounted for 1.7% of total Scottish holdings and 2.3% of the total farmed area of Scotland in 2013. However, 7.5% of seasonally rented PGRS holdings, area (9,031ha) and about 10% of holdings and 10% of area (3,705ha) of TGRS lets were by dairy holdings.
 - Non-LFA cattle and sheep and mixed holdings were important renters of seasonal TGRS and collectively they accounted for about 28% of holdings and 29% of area (11,067ha), despite together only having 7% of total Scottish holdings and 15% of total farmland in 2013.

Figure 8 Proportion of total rented-in seasonal grazing land and holdings by robust farm type, 2013.

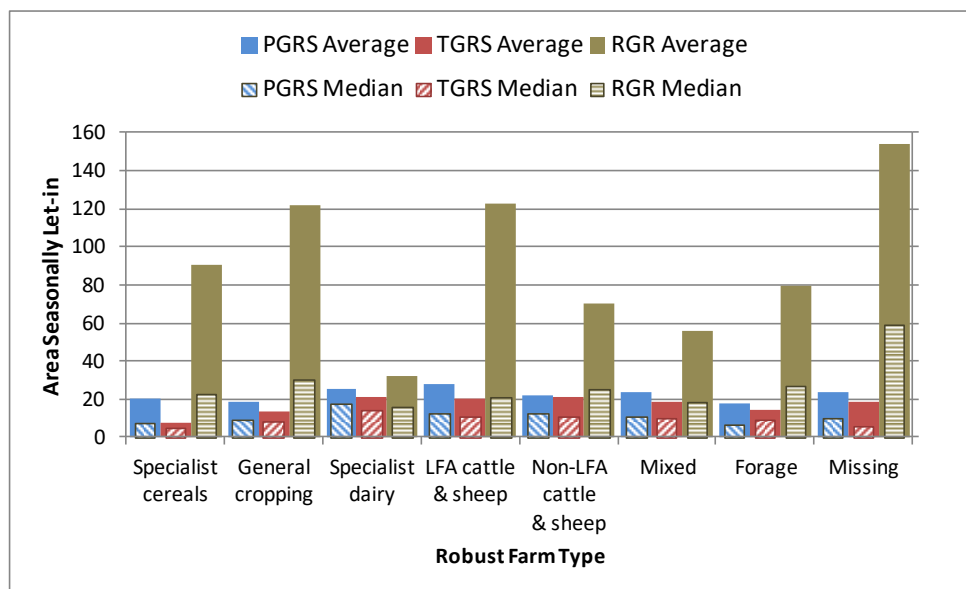


5.6 Figure 9 shows both the average (mean) and median areas of seasonal grazing land let-in by robust farm type in 2013.

- It was noticeable that the general cropping and specialist cereal holdings that rented-in seasonal RGR were renting-in large areas on average (122ha and 90ha respectively). The fact that the median RGR seasonal rent figures were 30ha and 22ha respectively highlights that there were a proportion of these cereal and cropping holdings that rented quite large areas (enough to pull the mean so far away from the median). Upon inspection there were a combined total of 10 holdings that rented-in more than 500ha of RGR in 2013, with a total of 19,000ha. There were no sheep recorded on these holdings and only 273 cattle.
- For LFA cattle and sheep a similar pattern emerges, with a mean of 123ha and median of only 21ha seasonally rented-in RGR. Upon inspection there were 78 holdings (over a quarter in the Highlands) that rented-in 1,000ha or more seasonal RGR that totalled over 151,000ha in 2013. All of these holdings had some cattle or sheep present (albeit often at low densities) with a total of 6,670 cattle and 78,500 sheep (all cattle and sheep – including calves, lambs, etc.). The total owned and tenanted land area on these holdings was 65,000ha.

No conclusions can be brought about why these holdings were renting-in such large seasonal grazing areas and as data on SFP entitlements were not examined only conjecture can be made about any 'slipper farming' on these holdings.

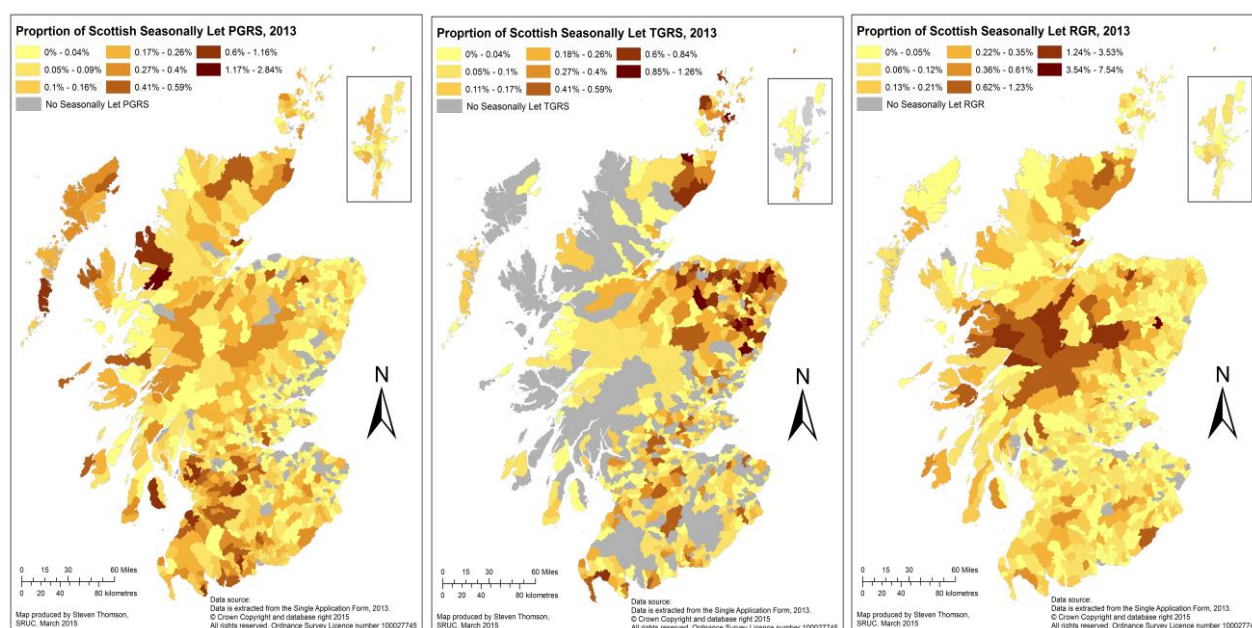
Figure 9 Mean and median area of rented-in seasonal grazing land and holdings by robust farm type, 2013



Agricultural Region

5.7 Figure 10 shows the proportion of total Scottish seasonally let grazings within each parish for 2013. For PGRS there was an East / West difference with parishes in the East containing generally lower proportions of total PGRS seasonal lets. Some of the parishes in the North-West have larger proportions of the total area of PGRS lets and this is due, in part to their larger physical size. During 2013 it is clear that the parishes in the North East of Scotland dominated the TGRS seasonal let market, with Caithness and Orkney also showing greater activity. In 2013 the central and West Highland parishes were seasonally let-in RGR was most prevalent.

Figure 10 Proportion of Scottish seasonally let TGRS, PGRS and RGR by parish, 2013



5.8 Table 4 shows both the proportion of total holdings and total area of seasonally let-in land across Scotland's agricultural regions (see Figure 1 for a map of the regions). It is evident that holdings in North East Scotland were important seasonal grazers in 2013.

- Whilst the North East accounted for 17% of Scotland's holdings and 12% of Scotland's farmland in 2013 the region had 36% of Scottish holdings and 40% (15,111ha) of the total area of seasonally rented-in TGRS. This may be related to the farming systems in operation across parts of the region where Spring Barley and TGRS rotations are popular and beef and sheep finishers may rent grazing parks.
- North East Scotland was also responsible for 19% of holdings and 20% (110,442ha) of the area of RGR rented-in on a seasonal basis.
- The Highlands were responsible for 13% of RGR seasonal let holdings and 26% (137,771ha) of the area¹³.
- Dumfries and Galloway (17% or 20,472ha) and Ayrshire (13% or 15,349ha) had larger than expected amounts of seasonally let in PGRS in 2013 and this is likely to be related to the prevalence of the dairy sector in these regions.

Table 4 Regional distribution of rented-in seasonal grazing land and holdings, 2013

Agricultural Region	Proportion of Scottish Total – Seasonal Let-in					
	PGRS		TGRS		RGR	
	Holdings	Area	Holdings	Area	Holdings	Area
Argyll & Bute	5%	5%	1%	1%	6%	8%
Ayrshire	9%	13%	4%	3%	7%	5%
Clyde Valley	8%	11%	6%	7%	7%	3%
Dumfries & Galloway	13%	17%	9%	11%	14%	10%
East Central	3%	4%	3%	2%	4%	2%
Eileanan an Iar	10%	3%	2%	0%	2%	1%
Fife	3%	3%	3%	3%	3%	3%
Highland	17%	15%	11%	9%	13%	26%
Lothian	2%	3%	3%	3%	3%	2%
NE Scotland	11%	10%	36%	40%	19%	20%
Orkney	5%	3%	9%	7%	5%	2%
Scottish Borders	5%	6%	4%	4%	6%	7%
Shetland	3%	2%	1%	0%	3%	1%
Tayside	6%	6%	8%	8%	9%	11%

5.9 Table 5 shows both the mean (average) and median areas of seasonal grazing land let-in by agricultural region in 2013. With the exception of the crofting regions both the mean (25-35ha) and median (15-20ha) areas of PGRS and mean (16-24ha) and median (8-13ha) areas of TGRS were relatively consistent across the regions. The areas with highest mean and median seasonally rented-in PGRS were in the areas with higher dairy and beef densities. For seasonally rented-in RGR there were very wide discrepancies between median and mean areas in Highland (the mean was 9 times the median), North East Scotland (5.6 times,) Tayside (3.4 times) and also in Argyll and Bute, Scottish Borders, Fife and Dumfries and Galloway (all about 3 times) with the averages significantly affected by large values.

5.10 The 213ha average of seasonally rented RGR for the Highlands was significantly influenced by the 88,000ha of seasonal RGR rented by 67 holdings

¹³ The figures for Highland were, however, slightly less than may be expected given it had 20% of total Scottish holdings and 32% of the total area in 2013

that rented-in over 1,000ha in 2013. These holdings only had a total of 40,800ha of land under ownership or under tenure. Only five of these holdings did not carry any cattle or sheep and the remaining 62 holdings had 4,135 total cattle and 42,800 sheep.

Table 5 Mean and median area of rented-in seasonal grazing land and holdings by agricultural region, 2013

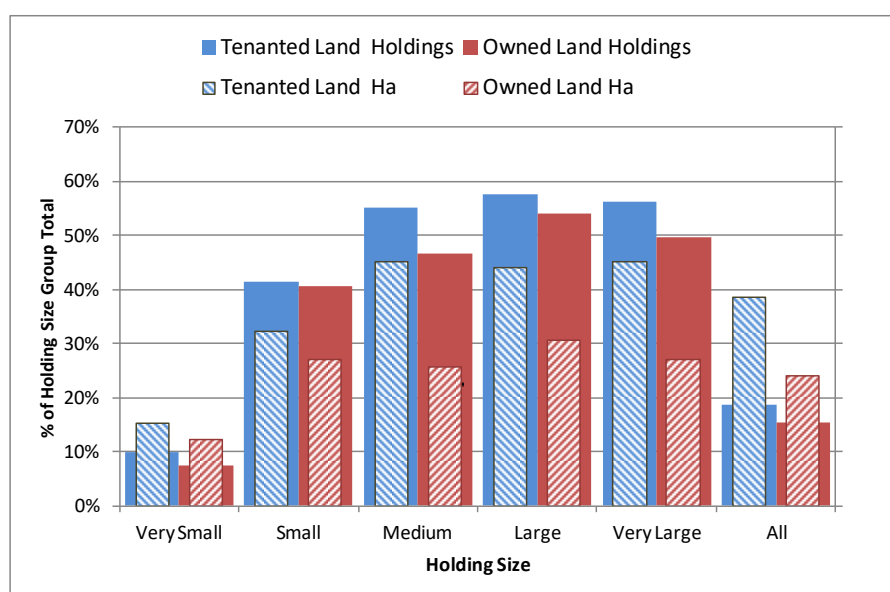
Agricultural Region	Proportion of Scottish Total – Seasonal Let-in					
	PGRS (Ha)		TGRS (Ha)		RGR (Ha)	
	Average	Median	Average	Median	Average	Median
Argyll & Bute	26	13	14	8	153	45
Ayrshire	36	25	16	10	69	26
Clyde Valley	33	21	22	13	48	18
Dumfries & Galloway	34	21	24	12	76	25
East Central	31	18	16	12	70	26
Eileanan an Iar	8	5	4	2	26	8
Fife	26	11	14	7	98	30
Highland	23	7	17	8	213	22
Lothian	28	16	22	9	79	36
NE Scotland	22	9	21	11	112	20
Orkney	16	11	16	10	41	16
Scottish Borders	31	17	17	12	108	32
Shetland	14	9	6	2	34	16
Tayside	27	14	20	12	122	36

6 CHARACTERISTICS OF HOLDINGS RENTING-IN SEASONAL GRAZINGS

Holding Size

- 6.1 This section utilises the JAC data for 2013 to compare characteristics of holdings that rented-in seasonal grazings compared to those that did not in 2013. Summary data tables are provided in Appendix 1.
- 6.2 Figure 11 shows the proportion of holdings with owned and tenanted land (solid fill bars) and the proportion of owned and tenanted area (hashed fill bars) for each size category. At the Scottish level seasonal grazers accounted for 15% of holdings that owned land and 19% of those with land rented under tenure arrangements in 2013. These seasonal grazers accounted for 39% (525,912ha) of the tenanted area and 24% (1.54m ha) of the owned area. These Scottish level figures were, however, heavily influenced by crofts and small holdings (crofts were not separated out for this analysis due to their ability to also rent-in seasonal grazings). However, when the size groupings other than very small and small were examined some clear patterns emerge:
- Within the medium, large and very large size groups the seasonal grazers accounted for about 55% of all holdings that had land under tenure agreements yet they only had about 45% of the total tenanted area within each size group in 2013. This means that within each size group that 45% of holdings that had tenanted land were non-seasonal grazers and they controlled 55% of the tenanted area.
 - Within the medium, large and very large size groups the seasonal grazers accounted for around 50% of all holdings that owned land but only accounted for 25-30% of the total owned area. The 50% of holdings that were non-seasonal grazers across these size groups therefore controlled 70-75% of the total owned area in these size groups.

Figure 11 Proportion of tenanted and owned holdings and area held by seasonal grazers across size groups, 2013



6.3 Inferences about seasonal grazers having smaller holdings can be made from Figure 11. However, Figure 12 and Figure 13 reveal that whilst the average areas of tenanted and owned land held by holdings that rented-in seasonal grazings were consistently lower across all size groupings the median areas held were very similar to those not renting-in seasonal grazings across size groupings. The differences between the mean and median figures highlight the influence of the largest holdings within each size grouping (i.e. they pull the average up but have no influence on the median). What therefore can be concluded is that the holdings in the third and fourth quartiles of each size group (the bigger holdings) cause the discrepancies between the seasonal grazers and non-seasonal grazers, with a proportion of these non-seasonal grazers having larger tenanted and owned areas. This may be a driver that has led some holdings to take on seasonal lets.

Figure 12 Mean and median area of tenanted land by size group and whether seasonal grazings were rented-in, 2013

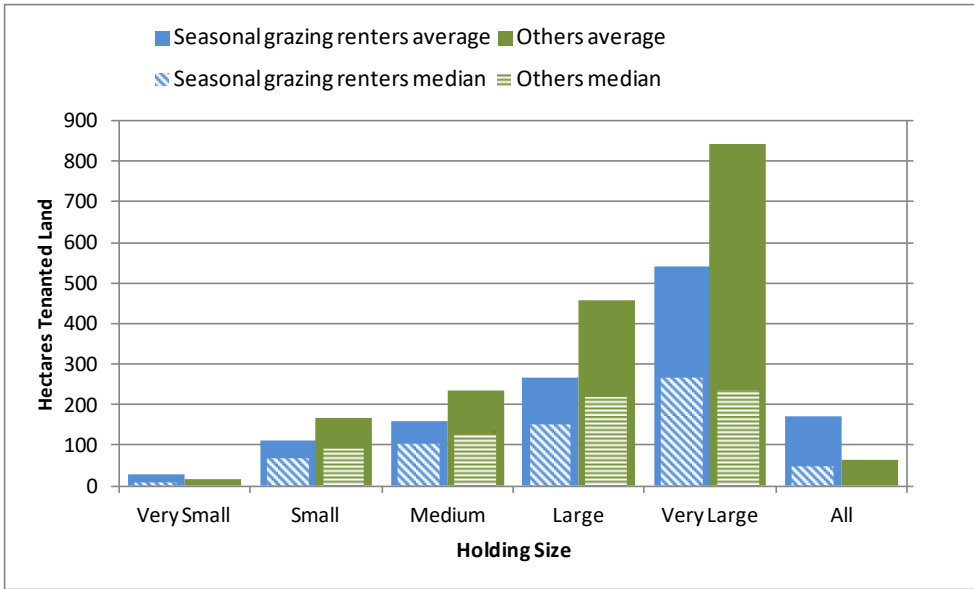
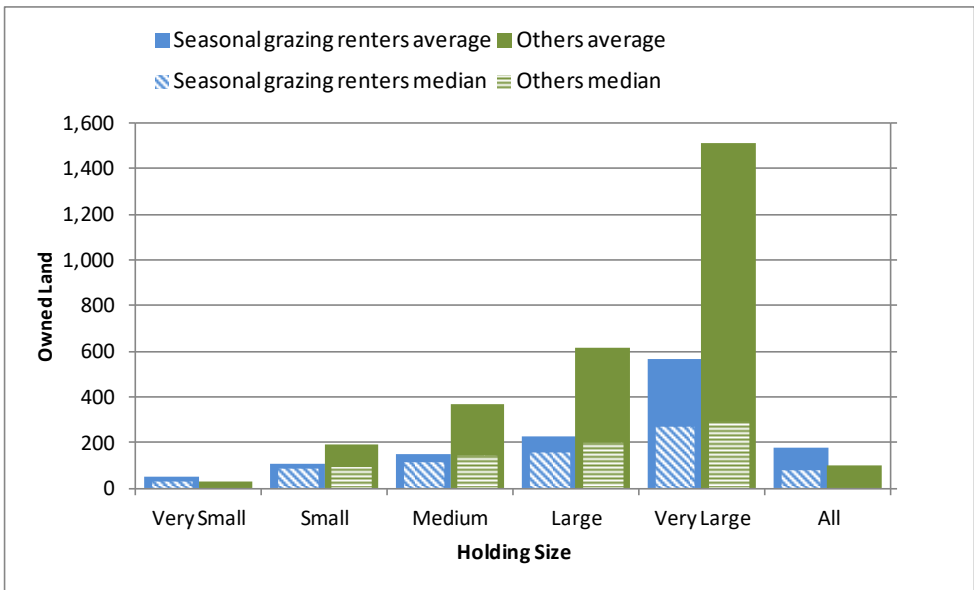
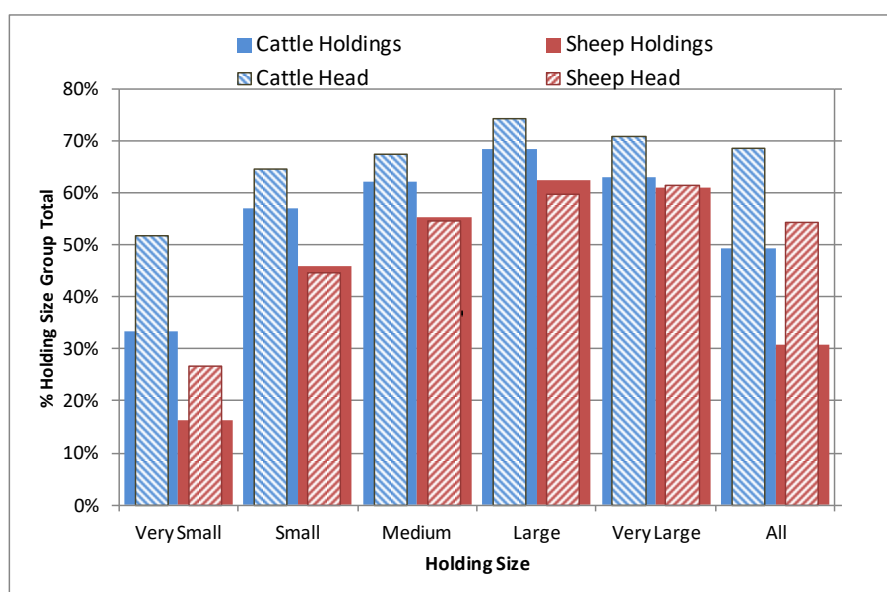


Figure 13 Mean and median area of owned land by size group and whether seasonal grazings were rented-in, 2013



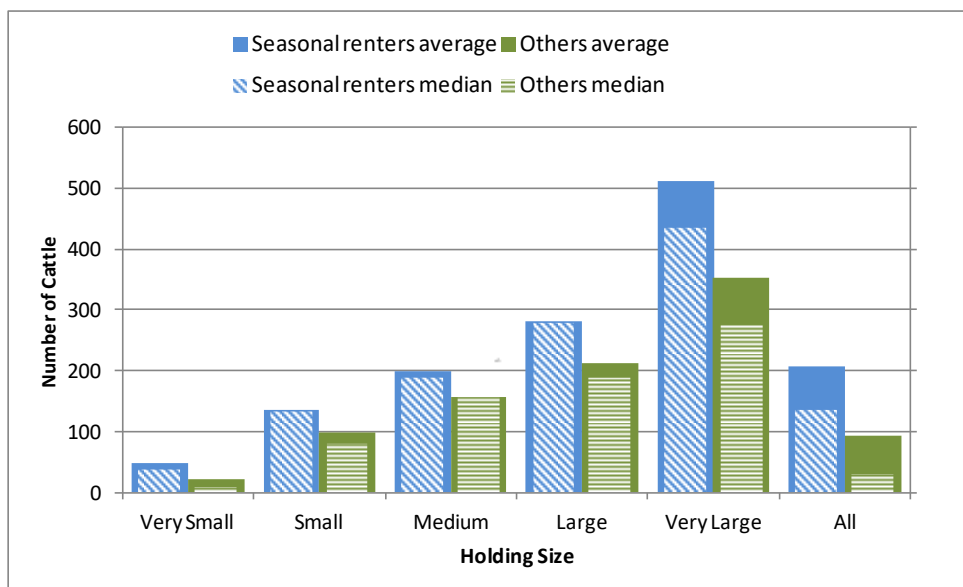
- 6.4 Whilst Figure 11 to Figure 13 suggest that those renting-in seasonal grazing lets were perhaps disadvantaged in the amount of land they have long term access to Figure 14 to Figure 16 show that there was a relationship between seasonal grazers and the presence of cattle and sheep. Figure 14 shows that, including crofts, at Scottish level the seasonal grazers accounted for just half of all holdings that had cattle and carried nearly 70% (1.23 million cattle) of the national herd. The seasonal grazers also accounted for 30% of all holdings with sheep and carried nearly 55% (3.58million sheep) of the national flock.
- In 2013 the medium to very large seasonal grazing holdings were more likely to carry sheep or cattle (or both) than non-seasonal grazers and in the case of cattle accounted for a disproportionately large proportion of the national herd.
 - For the large and very large holdings the seasonal grazers made up about 60% of the holdings with sheep, also accounting for around 60% of the sheep held by holdings within those size groupings.
 - For cattle, within the large size grouping the seasonal grazers made up over two thirds of the holdings with cattle and three-quarters of the cattle held by all holdings in the size group.

Figure 14 Proportion of cattle and sheep holdings and number of animals held by holding size groups for those that rented-in seasonal grazings, 2013



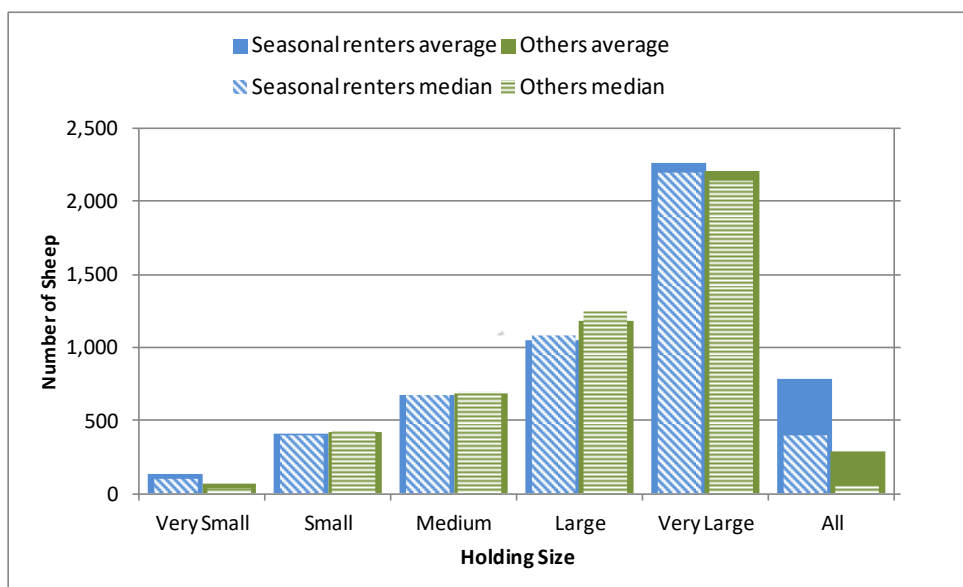
- 6.5 Figure 15 shows that generally seasonal grazers carried more cattle across all size groupings in 2013, whether measured by mean or median. The distribution of cattle within all size groupings, with the exception of the very large groups appears very even with means and medians very close together. For the small holdings with cattle group the seasonal grazers had on average 38% more total cattle than non-seasonal grazers. This pattern followed through the medium (26% more), large (32% more) and very large (45% more) holdings that carried cattle and was as pronounced when examining median numbers of animals held. Part of this relationship may be related to the high proportion of dairy holdings that rent-in seasonal grazings coupled with their large average herd sizes (408 cattle on average compared to 155 on mixed holdings).

Figure 15 Mean and median number of cattle by size group and whether seasonal grazings were rented-in, 2013



6.6 Figure 16 shows that there was very little difference between the mean and median number of sheep across size groupings for holdings that carried sheep (apart from very small holdings). Whilst the flock sizes on large and very large holdings did not differ on average between those that rented-in seasonally and those that did not, there was a larger proportion of the holdings (about 60%) that utilised grazing lets compared with those that did not (31% to 37%).

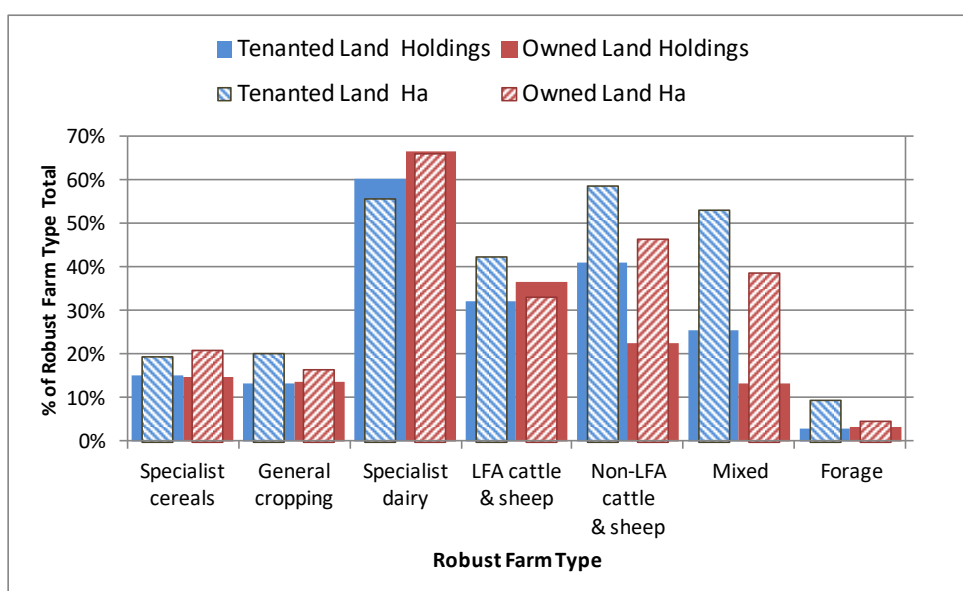
Figure 16 Mean and median number of sheep by size group and whether seasonal grazings were rented-in, 2013



Robust Farm Type

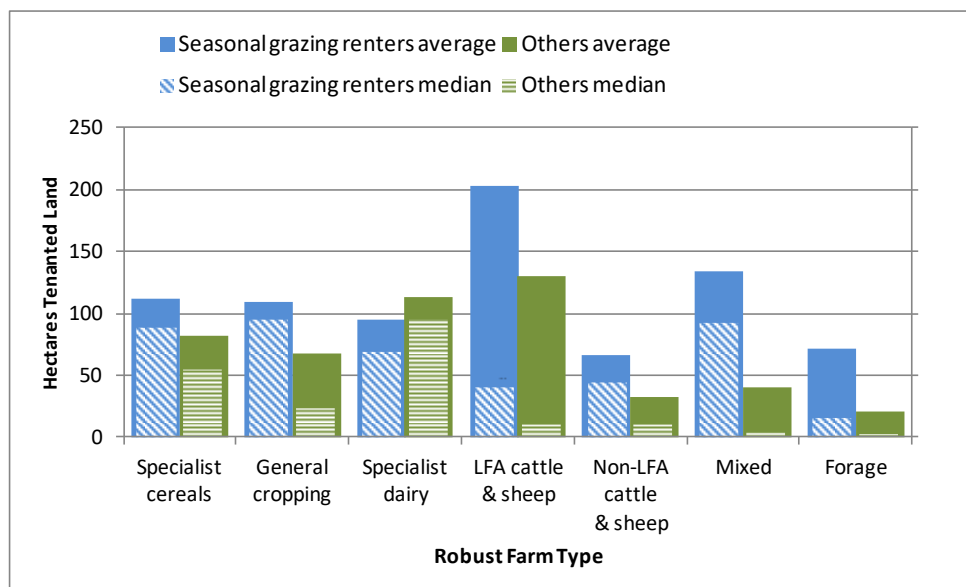
- 6.7 Figure 17 shows the land tenure status of seasonal grazers in 2013.
- About 12-15 % of cropping and cereal holdings that had some owned land or tenanted land in 2013 rented-in seasonal grazings.
 - There was a much higher propensity for dairy holdings with tenanted land (60%) or owned land (66%) to use seasonal lets.
 - A smaller proportion of cattle and sheep holdings in the LFA that rented land or owned land took on seasonal lets in 2013 (32% and 37% respectively) although seasonal grazers accounted for higher than anticipated area of tenanted land (40%).
 - For non-LFA cattle and sheep and mixed holdings there were disproportionately large proportions of the area of land under agricultural tenure and ownership that was controlled by those using seasonal lets compared to the proportion of holdings that were seasonal grazers (i.e. 42% of holdings with land under tenure but 58% of the tenanted area; 23% of the holdings owning land but 47% of the area).

Figure 17 Proportion holdings with owned or tenanted land that rented-in seasonal grazing in 2013, by robust farm type



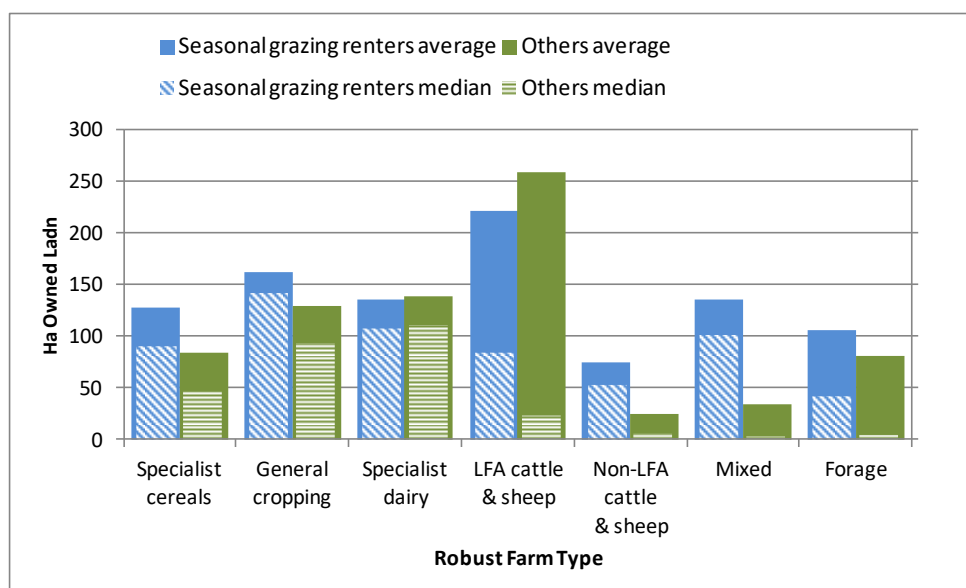
- 6.8 Figure 18 confirms that in 2013, with the exception of dairy holdings, those holdings with land under tenure that used seasonal grazing lets had larger average and median areas of tenanted land than those that did not. This was particularly noticeable for LFA grazing and mixed holdings where the average area of tenanted land for the seasonal grazers was 202ha and 134ha respectively compared to 129ha and 40ha respectively for the non-seasonal grazers.

Figure 18 Mean and median area of tenanted land by robust farm type and whether seasonal grazings were rented-in, 2013



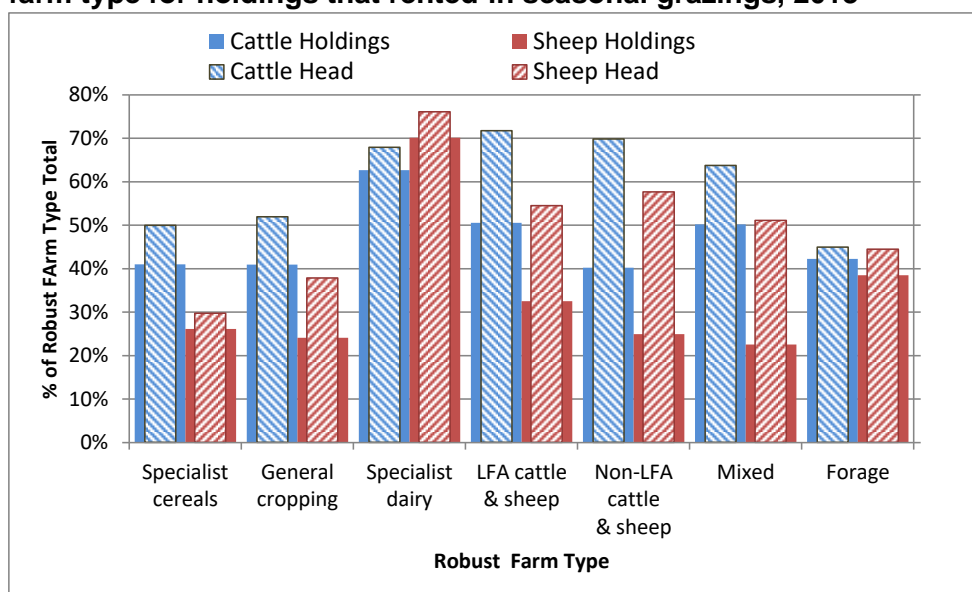
6.9 Figure 19 shows that for dairy holdings the average amount of owned land in 2013 was very similar between the seasonal grazers and those that did not rent-in seasonal grazings. Across all other farm types the seasonal grazers owned larger areas on average (whether using means or medians). However, the LFA cattle and sheep figures should be treated with some caution due to the influence of crofts (particularly on the median where their small areas were not countered by large holdings, as happens in the averages). We can therefore say that on average, with the exception of dairy holdings, that those holdings that used seasonal grazing lets in 2013 were bigger than those that did not.

Figure 19 Mean and median area owned by robust farm type and whether seasonal grazings was rented-in, 2013



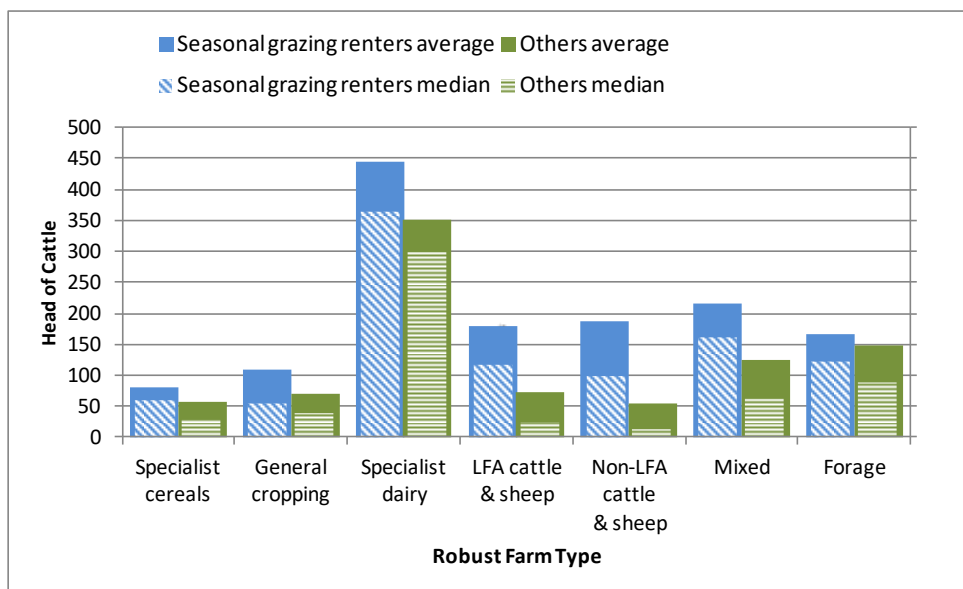
- 6.10 Figure 20 shows for 2013 the proportion of holdings that had cattle or sheep and the proportion of total cattle or sheep held within each farm type by seasonal grazers. In all instances the proportion of the sector's total cattle or sheep held was larger than the proportion of holdings with cattle or sheep for those that used seasonal grazing lets.
- 567 dairy holdings that rented-in seasonal grazings (63% of all dairy holdings) accounted for 251,407 (68% of total) cattle held on dairy holdings.
 - Just over half (3,751) the LFA cattle and sheep holdings that had cattle in 2013 used seasonal grazings yet they held 72% (668,718) of the total cattle held by LFA cattle and sheep holdings. A third of all holdings with sheep in the LFA cattle and sheep group used seasonal grazings in 2013 and they accounted for 54% of all the sheep held.
 - For non-LFA cattle and sheep holdings the seasonal grazers only accounted for 40% of the holdings but 70% of the cattle within the group. For non-LFA cattle and sheep holdings a quarter of holdings and 58% of total sheep were held by those that used seasonal grazings in 2013.

Figure 20 Proportion of cattle and sheep holdings and number of animals held by robust farm type for holdings that rented-in seasonal grazings, 2013



- 6.11 Figure 21 confirms that holdings with cattle that used seasonal grazings carried larger numbers of cattle on average (whether mean or median was used) compared to those holdings that did not use seasonal grazing lets. For example:
- Seasonal grazers in the dairy sector had an average of 443 (median 364) cattle compared to 351 (299 median) for non-seasonal grazers.
 - For LFA cattle and sheep holdings the seasonal grazers had on average 180 (median 118) cattle compared to only 72 (median 24) for the non-seasonal grazing renters.

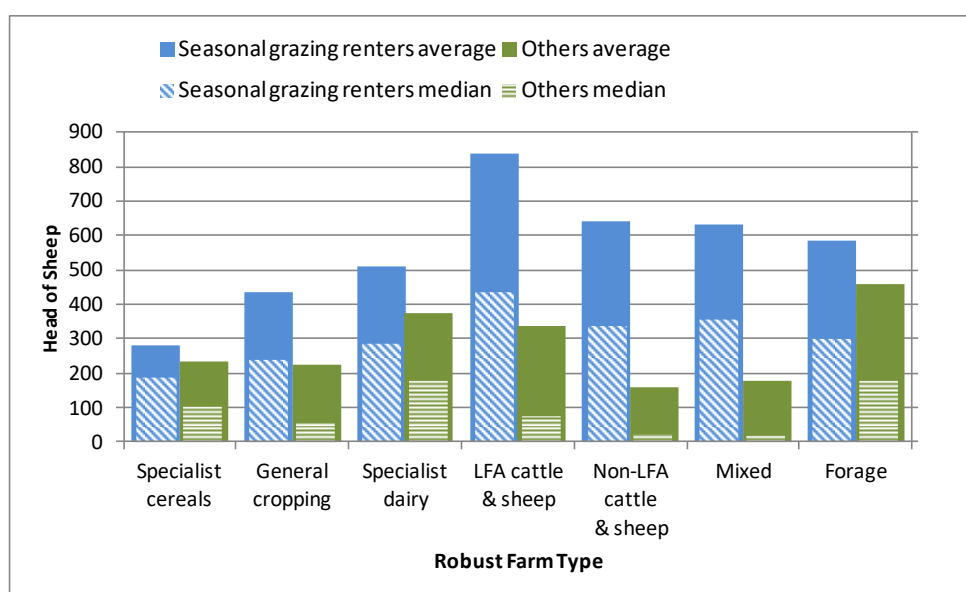
Figure 21 Mean and median number of cattle by robust farm type and whether seasonal grazings were rented-in, 2013



6.12 Figure 22 also confirms that holdings with sheep that used seasonal grazings carried considerably more sheep on average (whether mean or median was used) compared to those holdings that did not use seasonal grazing lets. For example:

- For LFA cattle and sheep holdings with sheep the seasonal grazers had on average 838 (median 437) compared to only 337 (median 78) for the non-seasonal grazers.
- On mixed holdings with sheep the seasonal grazers had on average 630 (median 359) cattle compared to 176 (median 18) for the non-seasonal grazers.

Figure 22 Mean and median number of sheep by robust farm type and whether seasonal grazings were rented-in, 2013



Agricultural Region

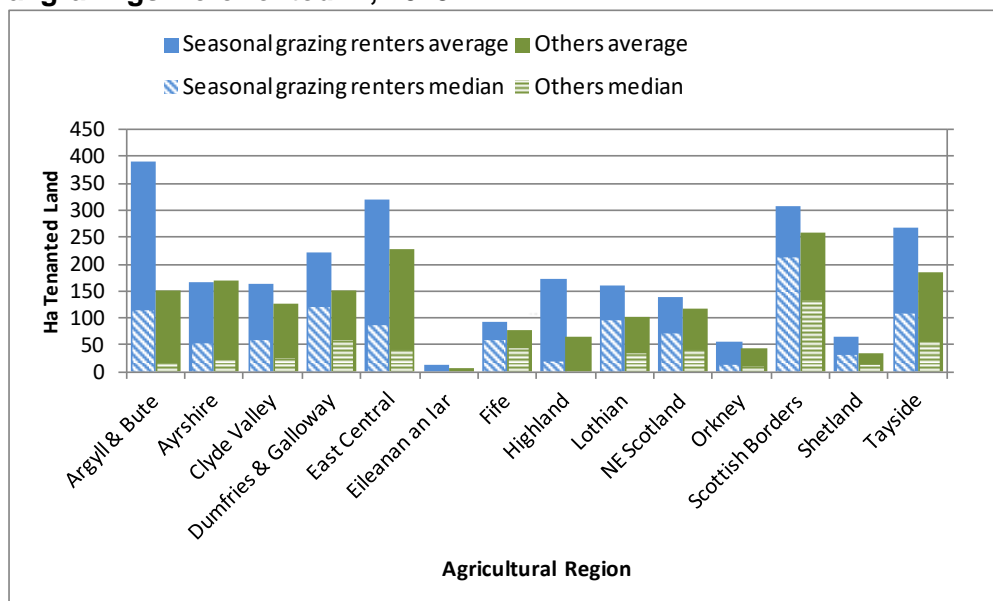
- 6.13 Table 6 shows the proportion of holdings with land under tenure, owned land, cattle and sheep within agricultural regions in 2013. Across all regions most of the holdings with some land under tenure were more likely to rent-in seasonal grazings than holdings with owned land.
- 6.14 There were considerable regional differences in the proportion of holdings with tenanted land that was controlled by seasonal grazers. In Ayrshire 45% of the holdings with tenanted land rented-in seasonal grazings in 2013 and they accounted for 45% of the total tenanted area. In Dumfries and Galloway seasonal grazers accounted for 43% of the holdings with tenanted land and 53% of the tenanted area whilst in Argyll and Bute the corresponding figures were 31% of the holdings and 53% of the tenanted area.
- 6.15 In 2013 the amount of land owned by the seasonal grazers was larger than the proportion of seasonal grazing holdings that owned land.
- In Fife the seasonal grazers only accounted for 14% of all holdings with owned land, yet these holdings controlled 34% of the total owned area.
 - In Ayrshire the seasonal grazers only accounted for 21% of the holdings with owned land but had 41% of the owned area
 - In Orkney seasonal grazers only accounted for 21% of the holdings and 49% of the owned area.
- These regions contrasted with Highland and Eileanan an Iar where the proportion of total holdings with owned land and the proportion of total owned area were very similar (and low) for seasonal grazers.
- 6.16 For holdings with cattle the seasonal grazers in all regions accounted for a disproportionately large proportion of the number of cattle held. In Dumfries and Galloway the seasonal grazers accounted for 54% of all holdings with cattle yet 69% of the cattle. In the North East of Scotland just under a half of holdings with cattle rented-in seasonal grazings yet they accounted for 69% of the region's cattle.
- 6.17 For holdings with sheep the seasonal grazers in each region also accounted for a disproportionately large proportion of the number of sheep held. In Highland the seasonal grazers accounted for a quarter of all holdings with sheep but 46% of all sheep. Similarly in the Borders the seasonal grazers accounted for 35% of the holdings with sheep but 53% of the sheep.

Table 6 Regional distribution of holdings with tenanted land, owned land, cattle and sheep that used seasonal grazings in 2013

Agricultural Region	% of Regional Total							
	Tenanted Land		Owned Land		Cattle		Sheep	
	Holdings	Ha	Holdings	Ha	Holdings	Head	Holdings	Head
Argyll & Bute	31%	53%	18%	27%	49%	65%	37%	55%
Ayrshire	45%	45%	21%	41%	59%	74%	45%	60%
Clyde Valley	36%	42%	18%	38%	56%	76%	43%	55%
Dumfries & Galloway	43%	53%	23%	44%	54%	69%	44%	63%
East Central	38%	46%	16%	30%	49%	66%	40%	57%
Eileanan an Iar	7%	11%	6%	7%	26%	47%	16%	28%
Fife	31%	34%	14%	33%	53%	68%	35%	71%
Highland	13%	29%	11%	10%	40%	63%	25%	46%
Lothian	25%	34%	14%	36%	50%	70%	32%	61%
NE Scotland	36%	40%	14%	22%	49%	69%	34%	57%
Orkney	42%	48%	21%	49%	61%	79%	43%	70%
Scottish Borders	37%	41%	15%	36%	50%	59%	35%	53%
Shetland	13%	21%	10%	30%	39%	59%	15%	34%
Tayside	30%	38%	14%	29%	48%	60%	37%	55%

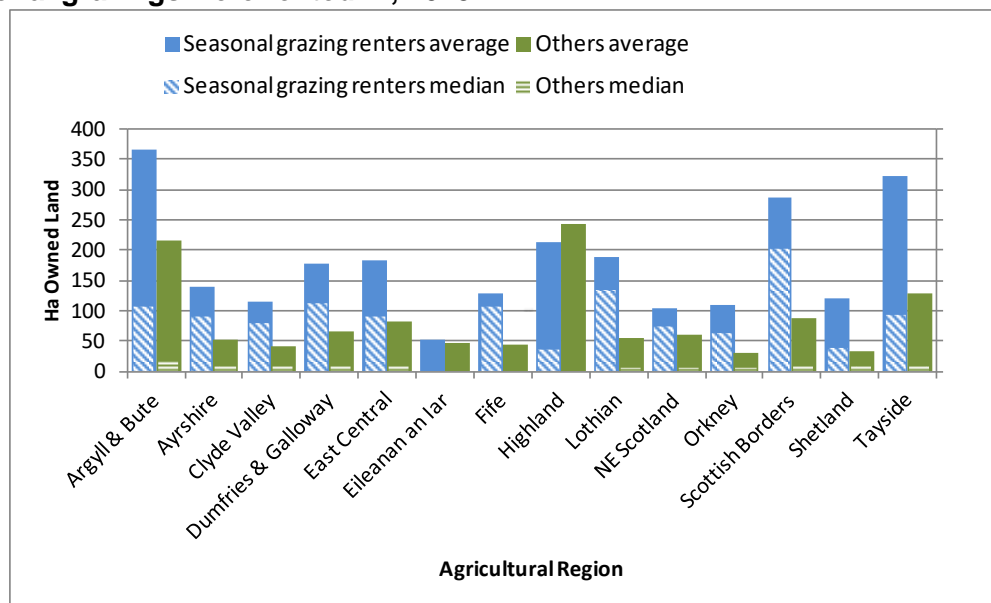
6.18 Figure 23 confirms that on seasonal grazing holdings with tenanted land the amount of land under tenure was considerably higher on average (whether measured by mean or median) across many regions compared to the non-seasonal grazers in 2013. Ayrshire was an exception, where the average area under tenure was marginally higher for the non-seasonal grazing renters, although when medians were examined, on average, they were lower (this shows the influence of some large holdings with tenanted land that did not rent-in seasonal grazings). In the Scottish Borders, an area with high levels of agricultural tenure, those renting-in seasonal grazings had about 50ha more (on average) tenanted land than the non-seasonal grazers.

Figure 23 Mean and median area of tenanted land by agricultural region and whether seasonal grazings were rented-in, 2013



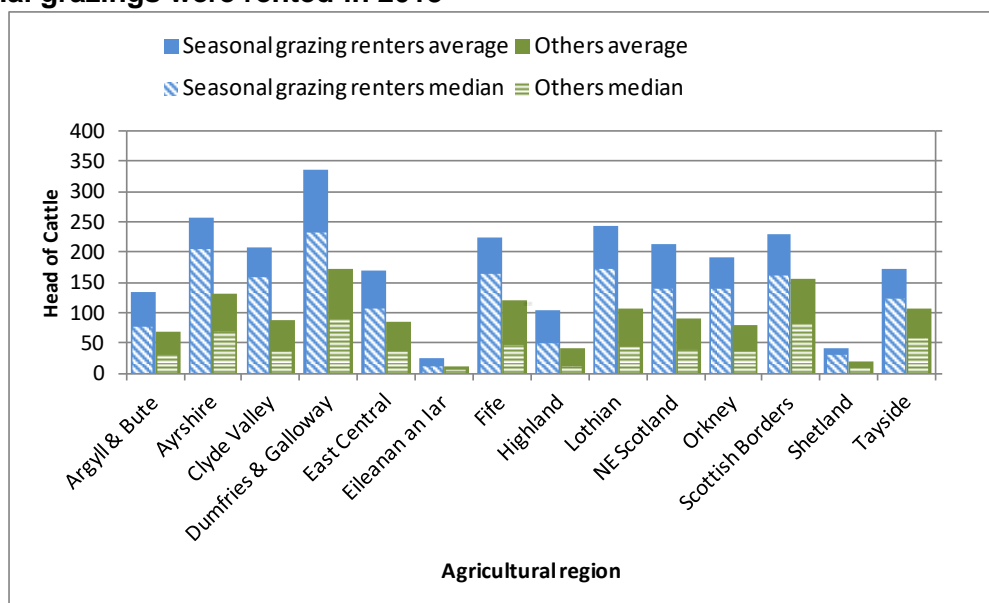
6.19 As with tenanted land, the average amount of owned land was also considerably higher on average for seasonal grazers across all regions with the exception of Eileanan an Iar and Highland, where the figures were skewed by large estates and small crofts. In Tayside the average owned area was 323ha (median 94ha) for the seasonal grazers, compared to 128ha (median 10ha) for the others. In Dumfries and Galloway the average area owned was 177ha (median 114ha) for seasonal grazers compared to 65ha (median 8ha) for those that didn't use seasonal grazings in 2013.

Figure 24 Mean and median area of owned land by agricultural region and whether seasonal grazings were rented-in, 2013



6.20 Figure 25 confirms that the number of cattle held on seasonal grazer holdings in 2013 was higher across all agricultural regions compared to non-seasonal grazers. The average number of cattle held by seasonal grazers was generally more than double that of those not using seasonal grazings (e.g. 140% higher in Orkney and Clyde Valley, 134% higher in the North East) although in Ayrshire, Argyll and Bute and Dumfries and Galloway it was 95%. In Fife the average number of cattle was 88% higher for seasonal grazers whilst in Tayside and Borders they were 61% and 47% higher for seasonal grazers. The average figures were clearly influenced by larger herds as the median number of cattle held was consistently more than 25% lower than the average for the seasonal grazers (and 40-50% lower for the non-seasonal grazers) across all regions. Average herd sizes were largest in Dumfries and Galloway at 335 (232 median) for seasonal grazers in 2013 compared to 172 (median 91) for those non-seasonal grazers.

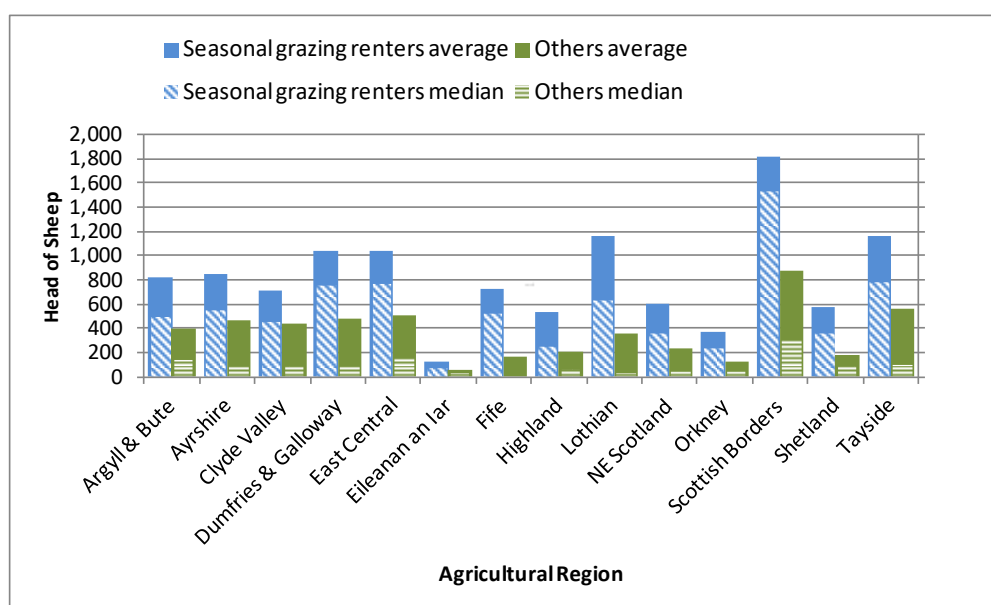
Figure 25 Mean and median number of cattle by agricultural region and whether seasonal grazings were rented-in 2013



6.21 The average number of sheep held by seasonal grazers in 2013 was consistently more than double the number held by non-seasonal grazers in 2013. The Scottish Borders (17%), Dumfries and Galloway (15%) and Highland (13%) accounted for 45% of the national flock (total sheep) in 2013.

- The average flock size for seasonal grazers in the Scottish Borders was 1,820 (median 1,534) compared to 871 (median 306) for non-seasonal grazers in 2013.
- For Dumfries and Galloway the average flock was 1,035 sheep (median 757) compared to 479 sheep (median 86) for non-seasonal grazers.
- In Highland the seasonal grazers had an average flock of 530 (median 249) compared to 212 (median 65) for non-seasonal grazers.

Figure 26 Mean and median number of sheep by agricultural region and whether seasonal grazings were rented-in, 2013



APPENDIX 1

Data Summary: Size Category

Table 7 Land and stocking data for seasonal grazers and non-seasonal grazer holdings by size category, 2013

	Very Small			Small			Medium			Large			Very Large			Total			Scotland		
	Total	SG	NSG	Total	SG	NSG	Total	SG	NSG	Total	SG	NSG	Total	SG	NSG	Total	SG	NSG	Total	SG	NSG
Total Land	Holdings	41,485	3,244	38,221	3,550	1,401	2,149	2,053	975	1,078	2,330	1,258	1,072	1,054	1,066	52,681	7,942	44,739			
	Ha	1,030,470	134,015	896,455	606,738	187,965	438,773	556,027	189,885	386,342	1,024,059	355,209	668,850	717,286	1,605,648	5,604,008	1,544,245	4,059,763			
	Average Ha	25	41	23	171	120	204	271	174	358	440	282	624	681	1,506	106	194	91			
Land Under Agricultural Tenure	Median Ha	5	22	5	97	90	102	142	133	152	198	183	230	357	338	9	86	6			
	Holdings	12,786	1,258	11,538	1,135	471	664	894	382	312	866	489	367	459	358	16,444	3,070	13,374			
	Ha	216,731	33,019	183,711	182,075	52,218	109,857	133,098	60,247	72,851	299,941	132,198	167,743	248,230	302,191	1,365,932	525,912	840,019			
Owned Land	Average Ha	17	26	16	143	111	185	192	158	233	346	265	457	674	541	83	171	63			
	Median Ha	4	10	4	83	68	92	119	106	131	174	152	220	259	270	7	48	5			
	Holdings	29,351	2,195	27,156	2,789	1,134	1,665	1,620	757	863	1,834	993	841	1,713	852	53,369	5,939	32,406			
Total cattle	Ha	836,220	103,073	733,147	443,210	119,805	323,405	432,164	111,915	320,548	741,159	228,183	514,975	1,782,562	480,331	1,302,231	4,304,459	1,041,151	3,263,309		
	Average Ha	28	47	27	158	106	194	267	147	371	404	228	612	1,041	564	1512	112	175	101		
	Median Ha	6	30	5	90	85	96	131	118	143	171	158	199	283	273	10	84	7			
Total sheep	Holdings	5,477	1,832	3,645	2,046	1,170	876	1,385	862	523	1,652	1,133	519	1,537	967	12,097	5,964	6,133			
	No	172,261	89,451	82,810	245,525	159,197	86,338	253,631	171,339	82,292	430,279	319,692	110,587	695,626	494,710	200,916	1,797,322	1,234,379	562,943		
	Average No	31	49	23	120	136	99	183	189	157	280	282	213	453	512	352	149	207	82		
Total Sheep	Median No	16	37	10	114	133	82	177	189	157	256	280	188	381	436	276	73	136	29		
	Holdings	9,335	1,516	7,819	1,742	802	940	1,118	618	500	1,383	865	518	1,240	757	483	14,818	4,558	10,260		
	No	774,475	206,786	567,679	724,259	324,488	399,771	764,935	419,924	345,011	1,526,124	912,126	613,998	2,780,818	1,713,318	1,067,500	6,570,611	3,576,652	2,993,959		
Seasonal (SFP) Permanent Pasture Lets	Average No	83	136	73	416	405	425	884	679	690	1,103	1,054	1,195	2,243	2,263	2,210	443	785	292		
	Median No	46	104	39	417	402	437	895	683	705	1,137	1,086	1,256	2,180	2,197	2,148	106	402	60		
	Holdings		1,845			704			505			724			613			4,804			
Seasonal (SFP) Temporary Grass Lets	Ha		28,085			16,988			13,909			24,740			30,175			119,162			
	Average Ha		15			24			26			34			49			26			
	Median Ha		6			14			16			22			28			12			
Seasonal (SFP) Rough Lets	Holdings		511			395			294			403			321			1,989			
	Ha		4,925			6,304			5,697			9,695			10,198			38,049			
	Average Ha		10			16			19			24			32			19			
Seasonal (SFP) Rough Lets	Median Ha		5			10			12			15			18			10			
	Holdings		1,833			842			605			732			670			5,152			
	Ha		116,000			51,343			90,023			73,617			141,074			544,106			
	Average Ha		63			61			149			101			211			106			
	Median Ha		17			20			22			27			50			24			

SG = Seasonal Grazers
NSG = Non Seasonal Grazers

Data Summary: Robust Farm Type

Table 8 Land and stocking data for seasonal grazers and non-seasonal grazer holdings by robust farm type, 2013

		Specialist cereals			General cropping			Specialist dairy			LFA cattle & sheep			Non-LFA cattle & sheep			Mixed			Forage			Scotland		
		Total	SG	NSG	Total	SG	NSG	Total	SG	NSG	Total	SG	NSG	Total	SG	NSG	Total	SG	NSG	Total	SG	NSG	Total	SG	NSG
Total Land	Holdings	2,671	381	2,290	1,079	135	944	892	567	325	14,415	4,732	9,683	2,344	567	1,777	5,631	780	4,751	22,164	702	21,462	52,681	7,942	44,739
	Average Ha	253,686	50,862	202,824	134,532	22,638	111,894	130,925	84,021	46,904	3,147,572	1,139,216	2,008,357	87,635	43,438	44,398	300,387	124,145	176,242	1,432,219	70,267	1,361,952	5,604,008	1,544,245	4,059,763
Land Under Agricultural Tenure	Holdings	58	101	51	86	157	80	116	114	119	218	241	207	37	77	25	54	169	37	65	100	63	106	134	91
	Average Ha	615	93	522	389	52	337	239	144	95	6,666	2,140	4,526	346	142	204	1,138	291	847	6,387	186	6,201	16,444	3,070	13,374
Owned Land	Holdings	53,346	10,396	42,950	26,279	5,685	22,594	24,354	13,605	10,749	1,018,754	433,240	585,514	15,866	9,339	6,527	73,105	38,866	34,239	140,813	13,211	127,602	1,365,932	525,912	840,019
	Average Ha	87	112	82	73	109	67	102	94	113	153	202	129	46	66	32	64	134	40	22	71	21	83	171	63
Total cattle	Holdings	57	89	54	31	95	24	79	70	96	14	41	11	23	45	11	8	93	4	3	16	3	7	48	5
	Average No	2,206	330	1,876	787	108	679	778	517	261	8,860	3,259	5,601	2,100	477	1,623	4,696	633	4,063	15,928	550	15,378	53,369	5,939	32,406
Total Sheep	Holdings	200,949	42,022	158,927	105,549	17,513	88,036	106,545	70,467	36,088	2,175,427	722,157	1,453,270	76,953	35,608	41,144	223,385	86,161	137,224	1,294,616	58,583	1,236,033	4,304,459	1,041,151	3,263,309
	Average No	91	127	85	134	162	130	137	136	138	246	222	259	37	75	25	48	136	34	81	107	80	112	175	101
Seasonal (SFP) Permanent Pasture Lets	Holdings	53	92	47	97	143	94	108	107	111	45	85	24	10	53	6	5	102	4	5	42	5	10	84	7
	Average No	300	123	177	149	61	88	905	567	338	7,360	3,715	3,635	1,700	684	1,016	1,335	670	665	277	117	160	12,097	5,964	6,133
Seasonal (SFP) Rough Lets	Holdings	19,758	9,875	9,883	12,848	6,674	6,174	370,097	251,407	118,680	981,656	668,718	262,938	182,448	127,403	55,045	227,179	144,858	82,321	43,207	19,420	23,787	1,797,322	1,234,379	562,943
	Average No	86	80	56	86	109	70	409	443	351	127	180	72	107	166	54	170	216	124	156	166	149	149	207	92
Total Sheep	Holdings	218	57	161	112	27	85	221	155	66	10,960	3,564	7,396	1,192	297	895	1,643	371	1,272	148	57	91	14,818	4,558	10,260
	Average No	53,634	15,943	37,691	30,869	11,688	19,181	103,615	78,895	24,720	5,479,226	2,985,617	2,493,609	330,931	190,755	140,176	457,268	233,694	223,574	74,809	33,266	41,543	6,570,611	3,576,652	2,993,959
Seasonal (SFP) Permanent Pasture Lets	Holdings	246	280	234	276	433	226	469	509	375	500	838	337	278	642	157	276	630	176	505	594	457	443	785	292
	Average No	125	189	102	89	240	59	268	286	178	132	437	78	43	337	25	32	369	18	246	303	180	106	402	60
Seasonal (SFP) Permanent Pasture Lets	Holdings	92	1835	1642	33	604	18	9,031	25	18	81,852	28	23	9,375	22	12	6,721	10	6	4,051	18	6	119,162	26	116,896
	Average No	20	7	9	9	9	9	18	18	18	12	12	12	18	12	12	23	10	6	6	6	6	12	6	6
Seasonal (SFP) Temporary Grass Lets	Holdings	89	681	592	40	551	14	173	21	14	954	19,300	5,665	264	5,665	264	5,402	18	10	1,314	94	91	38,049	19	37,859
	Average No	8	8	8	8	8	8	21	21	21	20	20	21	21	21	21	18	10	9	14	14	9	10	10	10
Seasonal (SFP) Temporary Grass Lets	Holdings	276	24,917	24,641	93	11,349	122	248	32	32	2,667	328,202	26,184	374	26,184	374	27,855	499	499	38,267	479	457	5,152	106	5,046
	Average No	90	90	90	122	122	122	7,972	7,972	7,972	123	123	70	70	70	70	56	56	56	80	80	80	106	106	106
Seasonal (SFP) Temporary Grass Lets	Holdings	22	22	22	30	30	30	16	16	16	21	21	25	25	25	25	16	16	16	27	27	27	24	24	24
	Average No	22	22	22	30	30	30	16	16	16	21	21	25	25	25	25	16	16	16	27	27	27	24	24	24

SG = Seasonal Grazers
NSG = Non Seasonal Grazers

Data Summary: Agricultural Region

Table 9 Land and stocking data for seasonal grazers and non-seasonal grazer holdings by robust agricultural region, 2013

Ag Region	Total Land				Land Under Agricultural Tenure				Owned Land				Total cattle				Total Sheep				
	Holdings	Ha	Average Ha	Median Ha	Holdings	Ha	Average Ha	Median Ha	Holdings	Ha	Average Ha	Median Ha	Holdings	No	Average No	Median No	Holdings	No	Average No	Median No	
Argyll & Bute	Total	1,975	481,266	244	26	587	131,279	224	28	1,482	368,952	242	25	655	65,883	101	52	781	433,253	555	228
	SG	391	164,281	420	130	180	70,209	390	113	280	95,263	366	108	323	43,107	133	78	290	239,896	827	504
	NSG	1,584	316,974	200	16	407	61,070	150	15	1,222	263,689	216	16	332	22,776	69	30	491	193,357	394	149
Ayrshire	Total	2,845	241,132	86	21	315	52,805	167	38	2,662	190,150	71	20	926	190,573	206	151	694	445,928	643	249
	SG	630	102,744	163	90	143	23,699	166	53	565	78,495	139	90	550	141,173	257	205	313	266,763	852	556
	NSG	2,215	138,388	62	10	172	28,906	168	23	2,097	111,655	53	10	376	49,400	131	70	381	179,165	470	90
Clyde Valley	Total	3,266	217,817	67	17	341	47,650	140	36	3,041	164,156	54	16	911	141,108	155	102	713	395,076	554	248
	SG	607	82,570	136	84	124	20,232	163	61	549	62,606	114	79	514	106,672	208	159	305	217,302	712	450
	NSG	2,659	135,247	51	10	217	27,418	126	25	2,492	101,550	41	9	397	34,436	87	36	408	177,774	436	90
Dumfries & Galloway	Total	4,127	459,818	111	27	778	140,236	180	90	3,541	320,173	90	19	1,653	429,369	260	169	1,325	962,195	726	347
	SG	1,013	215,178	212	123	335	74,063	221	122	797	141,170	177	114	889	297,763	335	232	589	609,569	1,056	757
	NSG	3,114	244,640	79	10	443	66,173	149	61	2,744	179,003	65	8	764	131,606	172	91	736	352,626	479	86
East Central	Total	1,551	189,070	122	19	211	55,544	263	55	1,407	136,730	97	16	412	51,665	125	68	366	263,862	721	356
	SG	258	67,827	263	105	80	25,675	321	86	226	41,264	183	91	202	34,097	169	109	146	151,408	1,037	777
	NSG	1,293	121,243	94	11	131	29,868	228	42	1,181	95,466	81	10	210	17,568	84	37	220	112,454	511	163
Eileanan an Iar	Total	6,485	87,207	13	3	5,319	42,179	8	3	1,101	51,037	46	1	459	6,487	14	8	2,283	165,574	73	44
	SG	468	8,149	17	5	386	4,494	12	4	69	3,569	52	2	121	3,024	25	11	374	46,666	125	75
	NSG	6,017	79,058	13	3	4,933	37,685	8	3	1,032	47,468	46	1	338	3,463	10	7	1,909	118,908	62	39
Fife	Total	1,538	95,674	62	10	225	18,462	82	48	1,393	79,265	57	8	289	52,277	175	113	240	86,111	359	91
	SG	230	31,568	137	110	69	6,368	92	60	201	26,005	129	108	157	35,345	225	165	85	61,284	721	524
	NSG	1,308	64,115	49	6	156	12,104	78	45	1,192	53,260	45	5	142	16,932	119	48	155	24,827	160	25
Highland	Total	10,396	1,822,967	175	5	4,635	363,451	78	4	6,228	1,497,325	240	6	1,950	127,548	65	20	2,975	870,466	293	95
	SG	1,123	246,444	219	36	616	105,859	172	20	682	146,127	214	38	784	80,566	103	50	757	401,018	530	249
	NSG	9,273	1,576,523	170	5	4,019	257,592	64	4	5,546	1,351,198	244	5	1,166	46,982	40	13	2,218	469,448	212	65
Lothian	Total	1,529	130,291	85	12	247	28,552	116	50	1,351	99,947	74	10	276	48,454	176	100	311	193,427	622	106
	SG	221	44,802	203	144	61	9,698	159	97	190	36,882	189	135	139	33,813	243	172	101	117,739	1,166	640
	NSG	1,308	85,489	65	8	186	18,854	101	37	1,161	64,065	55	7	137	14,641	107	45	210	75,688	360	38
NE Scotland	Total	8,921	692,477	78	12	1,354	167,293	124	52	7,921	524,510	66	9	2,362	355,863	151	80	1,718	620,089	361	116
	SG	1,418	178,884	126	86	487	67,112	138	72	1,137	117,951	104	75	1,159	246,813	213	140	583	352,617	605	355
	NSG	7,503	513,593	68	7	867	100,181	116	41	6,784	406,559	60	6	1,203	109,050	91	39	1,135	267,472	236	42
Orkney	Total	1,993	90,572	45	10	209	10,186	49	12	1,904	87,181	46	10	557	82,880	149	107	527	120,367	228	94
	SG	407	46,430	114	67	87	4,930	57	14	393	42,519	108	65	341	65,690	193	140	228	84,063	369	241
	NSG	1,586	44,142	28	6	122	5,256	43	11	1,511	44,662	30	6	216	17,170	79	37	299	36,304	121	43
Scottish Borders	Total	2,511	381,335	152	22	470	130,478	278	165	2,156	252,897	117	15	688	132,501	193	127	937	1,128,992	1,205	706
	SG	436	144,055	330	235	172	53,162	309	212	320	92,171	288	204	341	78,407	230	162	330	600,463	1,820	1,534
	NSG	2,075	237,279	114	12	298	77,316	259	132	1,836	160,726	88	10	347	54,094	156	82	607	528,529	871	306
Shetland	Total	1,853	83,598	45	13	1,103	42,160	38	14	927	39,410	43	10	167	4,700	28	15	1,182	285,075	241	103
	SG	181	21,751	120	48	138	8,836	64	32	97	11,674	120	40	65	2,759	42	30	172	97,992	570	358
	NSG	1,672	61,848	37	12	965	33,324	35	13	830	27,736	33	9	102	1,941	19	10	1,010	187,083	185	87
Tayside	Total	3,691	630,795	171	24	650	135,868	209	69	3,231	502,725	156	17	782	108,034	138	87	766	600,196	784	327
	SG	559	189,571	339	110	192	51,595	269	108	453	146,465	323	94	379	65,150	172	124	285	329,872	1,157	786
	NSG	3,132	441,224	141	14	458	84,273	184	57	2,778	356,260	128	10	403	42,884	106	59	481	270,324	562	101
Scotland	Total	52,881	5,604,008	106	9	16,444	1,365,932	83	7	53,369	4,304,459	112	10	12,097	1,797,322	149	73	14,818	6,570,611	443	106
	SG	7,942	1,544,245	194	86	3,070	525,912	171	48	5,939	1,041,151	175	84	5,964	1,234,379	207	136	4,558	3,576,652	785	402
	NSG	44,739	4,059,763	91	6	13,374	840,019	63	5	32,406	3,263,309	101	7	6,133	562,943	92	29	10,260	2,993,959	292	60

SG = Seasonal Grazers
NSG = Non Seasonal Grazers

Table 9 (continued) Land and stocking data for seasonal grazers and non-seasonal grazer holdings by robust agricultural region, 2013

Ag Region		Seasonal (SFP) Permanent Pasture Lets			Seasonal (SFP) Temporary Grass Lets			Seasonal (SFP) Rough Lets					
		Holdings	Ha	Average Ha	Median Ha	Holdings	Ha	Average Ha	Median Ha	Holdings	Ha	Average Ha	Median Ha
Argyll & Bute	Total	234	6,148	26	13	29	392	14	8	291	44,409	153	45
	SG												
	NSG												
Ayrshire	Total	423	15,349	36	25	78	1,269	16	10	368	25,273	69	26
	SG												
	NSG												
Clyde Valley	Total	383	12,660	33	21	126	2,782	22	13	352	16,911	48	18
	SG												
	NSG												
Dumfries & Galloway	Total	598	20,472	34	21	176	4,230	24	12	705	53,401	76	25
	SG												
	NSG												
East Central	Total	137	4,202	31	18	55	890	16	12	185	12,930	70	26
	SG												
	NSG												
Eileanan an Iar	Total	446	3,527	8	5	37	147	4	2	106	2,782	26	8
	SG												
	NSG												
Fife	Total	123	3,194	26	11	68	981	14	7	160	15,623	98	30
	SG												
	NSG												
Highland	Total	761	17,861	23	7	210	3,557	17	8	646	137,771	213	22
	SG												
	NSG												
Lothian	Total	108	3,028	28	16	56	1,226	22	9	154	12,232	79	36
	SG												
	NSG												
NE Scotland	Total	503	11,296	22	9	716	15,111	21	11	985	110,442	112	20
	SG												
	NSG												
Orkney	Total	214	3,489	16	11	179	2,843	16	10	254	10,455	41	16
	SG												
	NSG												
Scottish Borders	Total	245	7,683	31	17	85	1,469	17	12	328	35,381	108	32
	SG												
	NSG												
Shetland	Total	136	1,884	14	9	19	121	6	2	131	4,445	34	16
	SG												
	NSG												
Tayside	Total	284	7,551	27	14	153	2,987	20	12	469	57,176	122	36
	SG												
	NSG												
Scotland west	Total	4,804	119,162	26	12	1,989	38,049	19	10	5,152	544,106	106	24
	SG												
	NSG												

SG = Seasonal Grazers

NSG = Non Seasonal Grazers



***This work was funded by the Scottish Government as part of its
Economic Information Advisory Activity 211***